



SATERN

System for Administration, Training, and Educational Resources for NASA

Learning Needs Management

Classroom Guide

(Version 5.8 SP5)

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From the NASA SATERN Program Office:

All SATERN administrator training materials must be used alongside the SATERN Rules and Process Guide for administrators. The Guide identifies areas where SATERN functionality cannot enforce the Agency-defined usage of the system at NASA and provide guidance to enable administrator compliance with Agency-defined methods and procedures.



Table of Contents

Course Introduction	1
Course Objectives	1
Target Audience	2
Using this Guide	2
Additional Resources.....	3
Lesson 1: Items	5
Objectives.....	5
Item Main Concepts.....	5
Adding an Item	6
Item Key.....	6
<i>Lab 1. Add an Item</i>	<i>9</i>
Associating Competencies with Items	10
Main Tabs of Item Record	10
Summary Tab	12
Design Data Tab	15
<i>Lab 2. Edit Items: Design Data Tab</i>	<i>18</i>
Delivery Data Tab	19
<i>Lab 3. Edit Items: Delivery Data Tab</i>	<i>21</i>
Catalogs Tab	22
<i>Lab 4. Edit Items: Catalogs Tab.....</i>	<i>23</i>
Subject Areas Tab	24
<i>Lab 5. Edit Items: Subject Areas Tab.....</i>	<i>25</i>
Custom Fields Tab.....	26
SATERN Mandatory Fields for Items.....	28
Lesson-Related Reports.....	29
Conclusion.....	29
Lesson Check.....	30
Lesson 2: Curricula.....	31
Objectives.....	31



Curriculum Main Concepts	31
Characteristics of Curricula	31
Curriculum Status	32
Curriculum ID	33
Lab 6. Add a New Curriculum	34
Main Tabs of Curriculum Record	35
Summary Tab	35
Items Tab	36
Lab 7. Add Items to Curriculum	39
Assignment Profiles Tab	40
Catalogs Tab	40
Lab 8. Add Curriculum to a Catalog	41
Sub-Curricula	42
Lab 9. Adding a Subcurriculum	43
Lesson-Related Reports	44
Conclusion	44
Lesson Check	45
Lesson 3: Period-Based Curricula	47
Objectives	47
Period-Based Curriculum	47
Event vs. Calendar Basis	49
Effective Date	52
Assignment Type	53
Sequence Number	53
Lab 10. Setting Item Periods within a Curriculum	54
Lab 11. Setting a Fixed, Initial Required By Date	55
Conclusion	58
Lesson Check	59
Lesson 4: Manual Learning Assignments	61
Objectives	61
Learning Assignment Main Concepts	61
Assigning an Item using the Learning Plan Tab	62
Lab 12. Assign Items Directly to Learner Record	64



Assign a Curriculum	65
<i>Lab 13. Assign Curricula Directly to Learner Record</i>	<i>66</i>
Batch Learning Assignments	67
<i>Lab 14. Assign an Item Using Learner Needs Management Tool</i>	<i>68</i>
Lesson-Related Reports	69
Conclusion	69
Lesson Check	70
Lesson 5: Automated Learning Assignments	71
Objectives	71
Learning Assignment Main Concepts	71
Catalogs	72
Assignment Profiles	72
Assignment Profile for Catalogs	74
Groups and Attributes	77
Associating Curricula	81
<i>Lab 15. Add a New Assignment Profile</i>	<i>83</i>
Lesson-Related Reports	86
Conclusion	86
Lesson Check	87
Lesson 6: Record Learning Events	89
Objectives	89
Learning Event Main Concepts	89
Types of Learning Events	90
Item-Based Events	90
External Events	90
Data Recorded in a Learning Event	91
Accessing the Learning Event Recorder	92
<i>Lab 16. Recording a Learning Event for an Item</i>	<i>94</i>
Learning History	96
Items with Retraining	96
Certificate of Completion	97
Learning Event Editor	97



Lesson-Related Reports	98
Conclusion.....	98
Lesson Check.....	99
Course Summary.....	101
Learning Extras	103
Substitutes and Prerequisites	103
Topic Objectives	103
Substitute Items	103
Force Credit	104
Effective Date	105
<i>Lab 17. Establish a Substitute Relationship Using the Previous Example.....</i>	<i>106</i>
Prerequisites	107
<i>Lab 18. Establish a Prerequisite Relationship</i>	<i>109</i>
Topic Related Reports	110
Topic Conclusion	110
Topic Check.....	111
Item Revision Assistant	113
Topic Objectives	113
Revising Items	113
<i>Lab 19. Revise an Item</i>	<i>116</i>
Curriculum Clean Up.....	117
Topic Conclusion	117
Topic Check.....	118
Requirements-Based Curricula.....	120
Topic Objectives	120
Requirement-Based Curricula.....	120
What is a Requirement?	120
Requirement Types	121
<i>Lab 20. Create a Requirement</i>	<i>122</i>
Requirement Group	123
<i>Lab 21. Assign Requirements to a Curriculum.....</i>	<i>124</i>
Topic Conclusion	125
Topic Check.....	126



Required Dates Assistant	127
Topic Objectives	127
Required Dates Assistant	127
Lab 22. Use the Required Dates Assistant.....	129
Learning Event Synchronization	131
Topic Conclusion	131
Topic Check.....	132
Learner Management Tools	133
Topic Objectives	133
Notification Assistant.....	133
Lab 23. Send Item/Curriculum Assignment Notification.....	135
Topic Conclusion	137
Topic Check.....	138

Course Introduction

Through discussion, demonstration, and hands-on computer lab work, this course uses the concepts and terminology associated with SATERN's Learning Needs Management Model, and will help you develop a working knowledge of this model for use in implementation of your learning needs management strategy. You will gain basic skills in how to use SATERN to create and modify item and curriculum records, assign learning, and record learning events using the step-by-step, hands-on lab exercises.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

- Identify items in SATERN
- Add and modify items using step-by-step instructions contained in this classroom guide
- Identify curricula in SATERN
- Add and modify curricula using step-by-step instructions contained in this classroom guide
- Configure period-based curriculum assignments
- Assign learning to learners using step-by-step instructions contained in this classroom guide
- Propagate automated learning assignments to learners
- Record a learning event for an item

TARGET AUDIENCE





SATERN administrators (admins) responsible for:

- ◆ Adding and editing item (course) records
- ◆ Adding and editing curricula
- ◆ Assigning training in SATERN
- ◆ Recording learning events

USING THIS GUIDE

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

Icon	Definition
	Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.
	Note or Tip: Indicates additional information that is related to the information presented. It also provides helpful hints and tips or other guidance that further explains the information it accompanies.
	Lab: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.
	Warning: Warns against particular actions, or that a particular condition might indicate a problem.



ADDITIONAL RESOURCES

There are a number of additional resources that can provide you more information about the SATERN system. These resources include:

- ◆ Online SATERN system help
- ◆ Task-specific job aids



Notes

Lesson 1: Items

The goal for Lesson 1 is to provide detailed information about items and how to add and work with them in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Describe the item key
- Describe the purpose of important item record tabs and fields
- Add an item using the provided step-by-step instructions
- Identify and populate SATERN mandatory fields for item records

ITEM MAIN CONCEPTS



An item is an assignable unit that can be tracked in SATERN. It may be a learning or non-learning activity. Items are not created for External Training Requests in SATERN.

Items are usually thought of as “courses”; however, they can be much more. Other examples of items include:

- ◆ Fast Track to Pro Engineer Wild Fire 3.0
- ◆ Post Award Accountability
- ◆ Leadership Development at NASA
- ◆ Advanced Federal Contract Law

ADDING AN ITEM

When creating a new item, administrators use the **Add New Learning Item** wizard to enter key data. There are two types of mandatory fields in SATERN. The first type is fields that are required for the software to work properly, for example, every item must have an item ID, and be placed into a domain. These fields are identified in the system with red asterisks (*) so that administrators are reminded to populate those fields.

The second type is fields that NASA has determined are required to achieve usability, data integrity, and reporting needs. For example, the Transition Team determined that the Description field in the item record be made NASA-mandatory. This is an optional field in SATERN, but it should be made mandatory to ensure that learners have a clear understanding of the resources that are available to them to make informed decisions.

Item Key



First, an item key needs to be established. The item key is the unique identifier in the database and is made up of three parts:

- ◆ **Item type (reference):** This is a globally defined reference that helps categorize items. When administrators create a new item, they must choose from the defined list. Subsequently, each “type” has an associated “completion status.” This is an admin-defined reference used when recording a learning event. Examples include: Assess, Briefing, Conference, Document, Physical, and Workbook.
- ◆ **Item ID:** This is a unique identifier for each item within the SATERN database. It is recommended that a standard ID naming convention be applied to items and all records in the system.

***NASA Business Rule***

IDs start with the Center or Discipline acronym followed by a hyphen (-) followed by all upper case alpha or numeric characters to briefly identify the item.

For example:

- KSC-BOOK-ATR - A TEAM OF RIVALS: THE POLITICAL GENIUS OF ABRAHAM LINCOLN
 - JSC-DA-TAWS - TEAM ACCELERATOR WORKSHOP
 - GRC-MEA-AS - AEROSPACE SYMPOSIUM
- ♦ **Revision date/time stamp:** SATERN automatically populates these fields if the administrator does not edit them when adding a new item. If needed, the administrator can manually enter data into these fields. This field uniquely identifies when the item has been revised.

Some examples of item keys include:

- ♦ BOOK KSC-BOOK-ATR 1/25/2008 01:25 PM EST
- ♦ WORKSHOP JSC-DA-TAWS 1/17/2007 04:17 PM EST



Activity

Create an item key for items that you will create in the upcoming lab:



Lab 1. Add an Item

Step

1. Click the **Quick Links** drop-down menu in the top menu frame.
2. Select **Add New Learning Item**.
3. Select an item type from the drop-down menu.
4. Enter an item ID.
5. Enter a revision date and time.
6. Enter a description of the item.
7. Enter the item title.
8. Select a domain for the item – domain clarification provided later.
9. If there is an entry in the **Approval Process** field, remove it.
(If there is a drop-down menu, scroll to the very top of the list and select the blank entry.)
10. Uncheck the **Approval Required** checkbox (if it is currently checked).
11. Leave all other fields blank.
12. Click the **Next** button **four** times.



Note: No approval process is used in this lab. All other fields will be discussed in later lessons. The skipped steps of the Add New Learning Item wizard will be covered in later labs.

13. Review the information and if everything looks okay, click the **Save** button.



Note: The **Previous** button may be used to go back to an earlier step and make changes.



Associating Competencies with Items

The ability to associate a competency with an item provides a benefit to learners when they are adding competency-related goals and activities to their IDP. It also provides benefit to the Center whose Training Offices and Workforce Planning Offices wish to run reports associated with training on certain competencies.

Situation: Since neither the Centers nor the NSSC are associating competencies with items, there is no infrastructure in place to support the function to add competency-related goals and activities to the IDP, yet we have developed training materials and Quick Reference Guides that train our learners how to do this. This often leads to learners' frustration with the IDP when they search for competency-related items and yield no results.

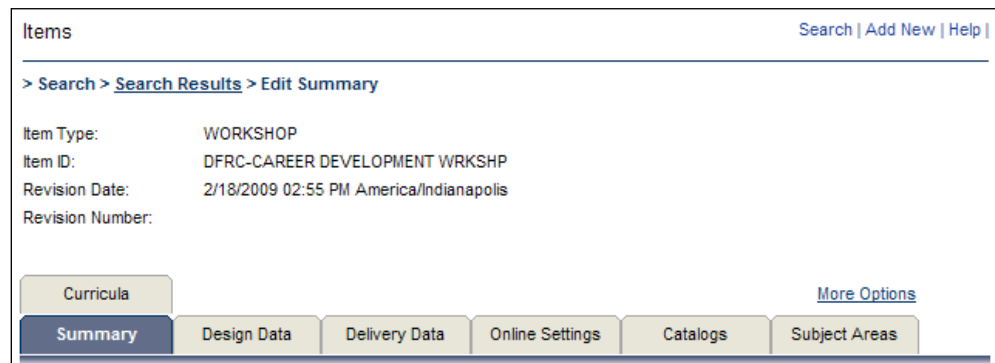
NASA Business Rule

When new items are added to SATERN, the administrator must associate at least one primary competency to the item. The Center may associate as many competencies as they feel necessary to capture data needed for reports and to better assist the learner in identifying competency-related activities on the IDP. Because competency ratings serve no purpose in SATERN, the administrator should leave the rating at "1".

MAIN TABS OF ITEM RECORD

The item is organized into functional areas by tabs (Figure 1). These tabs provide administrators with access to fundamental information regarding the item. Several important fields on these tabs are not required, but provide administrators a way to locate

items with similar attributes and conduct more detailed searches when running reports or assigning training to learners.



The screenshot displays the 'Items' management interface. At the top, there are links for 'Search', 'Add New', and 'Help'. Below this is a breadcrumb trail: '> Search > Search Results > Edit Summary'. The main content area shows item details: 'Item Type: WORKSHOP', 'Item ID: DFRC-CAREER DEVELOPMENT WRKSH', 'Revision Date: 2/18/2009 02:55 PM America/Indianapolis', and 'Revision Number:'. At the bottom, there is a tabbed interface with 'Curricula', 'Summary', 'Design Data', 'Delivery Data', 'Online Settings', 'Catalogs', and 'Subject Areas'. The 'Summary' tab is currently selected and highlighted in blue. A 'More Options' link is visible to the right of the tabs.

Items							Search Add New Help	
> Search > Search Results > Edit Summary								
Item Type: WORKSHOP								
Item ID: DFRC-CAREER DEVELOPMENT WRKSH								
Revision Date: 2/18/2009 02:55 PM America/Indianapolis								
Revision Number:								
Curricula								More Options
Summary	Design Data	Delivery Data	Online Settings	Catalogs	Subject Areas			

Figure 1. Item Record: Standard Tabs

The main tabs of the item record include:

- ◆ Summary
- ◆ Design Data
- ◆ Delivery Data
- ◆ Catalogs
- ◆ Subject Areas
- ◆ Curricula (covered in Lesson 3)
- ◆ Custom Fields

Summary Tab

You can use the Summary tab of the selected item to create and/or update the basic attributes of the item. Some of these attributes include, for example, its source, domain, delivery method, assignment type, and so on. You can also view and maintain a description of the item, and update the date the selected item was created.

Table 1 provides the fields found on the item record Summary tab, a description of each field, and whether the field is displayed to the learner. A + indicates a NASA required field. A * indicates a system required field.

Table 1. Item Record: Summary Tab Fields and Descriptions

Field	Description	Displays to Learner
Title +	Displays on the learner's Learning Plan and in the catalog. NASA Business Rule: Entered in all upper case.	X
Classification	Determined by the SATERN system based on the data in the item record (and whether scheduled offerings have been created for the item): <ul style="list-style-type: none"> • Instructor-Led: Includes segments (and/or scheduled offerings), and no online settings • Online Item: Includes online settings, and no segments • Blended: Includes both online settings and segments (and/or scheduled offerings) • Other: Includes neither online settings nor any segments or scheduled offerings. Therefore, never scheduled and cannot be launched 	X



Field	Description	Displays to Learner
Source ID +	<p>Indicates where an item came from (internal or external).</p> <p>NASA Business Rule: Select INTERNAL for on-site training and EXTERNAL as the source ID for all off-site/external training.</p> <p>INTERNAL – On-site training coordinated by the training organization or discipline for multiple employees, which may or may not include any cost. All NASA-sponsored web-based training (e.g., SkillSoft) is considered INTERNAL.</p> <p>EXTERNAL – Off-site training – External training provided to individuals or groups such as conferences, seminars, academic classes, etc. usually requires the submission of a SF-182 via SATERN for approval and processing. The only exception to the NSSC processing external training, captured on the SF-182, would include Reportable conferences. <u>Reportable</u> conferences, as defined per NID 3712.1, “Requirements Relating to Conference Attendance, Obligations and Expenditures” shall be submitted as a <u>No Cost</u> entity on the SF-182, with all pertinent cost information captured in the “course comments” section for <u>Center</u> processing and registration purposes.</p>	X
Domain*	<p>Identifies administrative ownership of the record.</p> <p>NASA Business Rule: Agency discipline items will be placed in the Discipline domain and then added to a catalog when appropriate. When a Center has created or owns Center-specific training items, those items will be placed in the Center Domain, regardless of their relationship to discipline subject areas.</p>	
Method ID +	Indicates how an item is delivered (ILT, WBT, book, video, etc.).	X

Field	Description	Displays to Learner
Assign. Type ID	Sets the default indicator on whether an item is required or optional when assigned to a learner. NASA Business Rule: The mandatory assignment type should be assigned only to courses that have been approved through the formal federally mandated training vetting process. Approved courses will have been vetted by the Office of Human Capital Management and the Office of General Council, and will meet the Office of Personnel Management definition for federally mandated training. No other courses should be labeled as mandatory. Once an approved course has been given an assignment type of mandatory, the SATERN administrator should not override the assignment type without prior approval from the content owner.	X
Approval Process ID	Indicates a default approval process (if applicable) that a learner must complete before being able to complete the self-registration process or launching of an online item.	
Approval Required	This checkbox triggers the approval process entered in the Approval Process ID field.	
Shipping Required	This checkbox is used to indicate whether the shipping of materials is required. (Note: NASA does not use this functionality)	
Safety Related	This checkbox is for admin informational purposes only.	
Approved	This checkbox is for admin informational purposes only.	
Active	This checkbox is used to indicate whether an item is active and available to learners.	
Auto Fill Registration	Sets the default for scheduled offerings of this item, so that learners are automatically moved from the waitlist to registration slots that open up when previously registered learners withdraw.	
Enable Learner Requests	Selecting this checkbox enables the Request Schedule button to be visible to learners.	X
Enable Learners to Waitlist	Selecting this checkbox indicates that the system will allow learners to be waitlisted for the scheduled offerings created from the item. Waitlisted learners automatically replace learners who are withdrawn from the item if you select the Auto Fill Registration check box.	X
Do Auto Competency	Sets the default within the Learning Event Recorder to give learners the corresponding rating for each competency tied to the item (if completed with a "For Credit" status).	

Field	Description	Displays to Learner
Learner can record Learning Events for themselves	This checkbox indicates whether a learner can self-record a learning event for this item.	
Supervisors can record Learning Events for subordinates	This checkbox indicates whether a supervisor can record a learning event for his/her subordinates.	
Create Date	Indicates the creation date of the course content.	
Registration Threshold Days	Determines the number of days before a learner can self-register into another offering of an item in which they are already registered.	
Description +	A 2,000-character field that is used to describe the item to learners, entered in sentence case.	X
Comments	This field is for admin informational purposes only.	
Instructor Materials	This field is for admin informational purposes only.	
Learner Materials	This field is for admin informational purposes only.	
Rating	Used to display a rating of the item to learners in the catalog. This rating setting is manually selected by administrators.	X

Design Data Tab

You can use the Design Data tab (Figure 2) to review and revise design information of the selected item including:

- ◆ Who revised the item
- ◆ The approving official/individual or group
- ◆ Default credit values (contact, credit and CPE hours) of the item
- ◆ Location where the lesson materials are stored
- ◆ Target audience for the item
- ◆ Default initial assignments: The number of days (weeks, months, quarters or years) a learner is allowed between the assignment

of a learning requirement and the required completion of that requirement. For example, if an item is assigned an initial period of 30 days, whenever that item is assigned to a learner, that learner has 30 days to successfully complete the item before their learning requirement becomes overdue. Each item can have an initial period assigned to it, and initial periods can be overridden on assignment.

- ◆ Default retraining assignments: Refers to the number of days (weeks, months, quarters or years) between the last time a learner completed an item and when he/she must complete it again. This applies only to items for which there is a requirement for recurring training. If a retraining interval passes without completion, the curriculum becomes incomplete.
- ◆ Retraining period: Refers to the number of days (weeks, months, quarters or years) between the last time a learner completed an item and when he/she must complete it again.



Note: *These options above are only applicable to a curriculum.*

Other information on this tab includes:

- ◆ Contact's email: An e-mail will be sent to this address when the Item Scheduling Demand Automatic Process is run.

NASA Business Rule

- ◆ Enter a contact e-mail in this field.

Edit the Design Data for the Item

Apply Changes Reset

Reviser:

Approved By:

Approval Date: (MM/DD/YYYY)

Lesson:

Audience:

Default Initial Assignments:

Initial Number: (1000,001) Initial Period:

Initial Basis: ☐ Calendar ☒ Event

Default Retraining Assignments:

Retraining Number: (1000,001) Retraining Period:

Retraining Basis: ☐ Calendar ☒ Event

Contact's Email:

Item Goals:

Apply Changes Reset

Contact Hours: (1000)

Credit Hours: (1000)

CPE Hours: (1000)

Figure 2. Item Record: Design Data Tab

Required and mandatory fields on the Design Data tab of the item record include:

- ◆ Contact Hours
- ◆ Audience
- ◆ Contact E-mail



Lab 2. Edit Items: Design Data Tab

Step

1. Using the item created in Lab 1, select the **Design Data** tab.
2. Enter the target audience for your item.
3. Enter the default initial period.
4. Enter the default retraining interval.
5. Enter a contact's email address.
6. Enter goals for the item.
7. Click the **Apply Changes** button.



Delivery Data Tab

This tab allows an administrator to establish the default scheduling structure of the item. The administrator can enter a default minimum and maximum registration (# of seats) which can both be overridden at the time the item is scheduled. The admin can also indicate the prep time that should be allocated for the instructor.

Complete the minimum registration field for items classified as “instructor-led”. This field is used when the Item Scheduling Demand automatic process is run. When the number of learner request for the item equals the number entered in the minimum registration field, SATERN will send an e-mail to the e-mail address entered in the Contact field on the Design Data tab.

The Delivery Data tab contains the default segments added when the item was created. A segment is a block of time within a scheduled offering. The defaults are used when the item is scheduled. At the item level, the admin can indicate the day, duration, location type, materials, and equipment needed for each segment. Once a scheduled offering of the item is created, a specific date, time, instructor, location, and equipment can be indicated for each segment.

Additional information on the Delivery Data tab (Figure 3) includes:

- ◆ Length (this is the total hours value)
- ◆ Prep Time (Instructor)
- ◆ Default Minimum Registration: When the number of learners who have requested this item reaches this number, an email is sent to the contact (on Design Data tab) to recommend scheduling this item.

- ◆ Default Maximum Registration
- ◆ Self Registration checkbox

Update the Delivery Data for the Item

Length:
(1000)

8.00

Prep Time:
(1000)

1.00

Minimum Registration:
(1000)

5

Max Registration:
(1000)

30

Self Registration:

☒

Apply Changes

Reset

Add a Default Segment to the Item

Seg#	Segment	Day (1000) Duration (1000)	Offset (1000)	Location Type	
3		2 8.00			Add

Update the Scheduling Defaults for the Item

Apply Changes

Reset

Select All / Deselect All

Seg#	Segment	Day (1000) Duration (1000)	Offset (1000)	Location Type		Remove
1	Morning	1 4.00		CLASS-PC (Computer Equipped Classroom)	Materials Equipment Copy to All Duplicate Day	<input type="checkbox"/>
2	Afternoon	1 4.00	1.00	CLASS-PC (Computer Equipped Classroom)	Materials Equipment Copy to All Duplicate Day	<input type="checkbox"/>

Figure 3. Item Record: Delivery Data Tab


NASA Business Rule

Course duration is written to history based on the segment time that is entered. For a full, eight-hour day, if administrators do not exclude the lunch break, the break will be included in official course time recorded to the learner's history. Therefore, when scheduling an eight-hour day, enter two four-hour blocks/segments with a half-hour or hour time block for lunch so that only 8 hours is recorded. This is time block is referred to as a "segment offset." The offset will represent the break between two segments occurring on the same day; therefore, offsets should not be entered on the first segment of the day.



Lab 3. Edit Items: Delivery Data Tab

Step

1. Using the item created in Lab 1, select the **Delivery Data** tab.
2. In the *Update the Delivery Data for the Item* section:
 - a. Enter the prep time (in hours).
 - b. Enter the minimum registration.
 - c. Enter the maximum registration.
 - d. Click the **Self Registration** checkbox.
 - e. Click the **Apply Changes** button.
3. In the *Add a Default Segment to the Item* section:
 - a. Enter a description for segment 1 in the **Segment** field.
 - b. Change the duration.
 - c. *Optional:* Add another segment for the same day.
 **Note:** Change the day in the **Day** field. If you add another segment to the same day, enter **1** in the offset field. This causes a 1-hour gap between segments. This can be useful to account for lunch or an extended break.
 - d. Select a location type from the drop-down menu.
 - e. Click **Add**.
4. Repeat steps 3a-3e to create another default segment for the item with “Afternoon Lab” as the description.

Catalogs Tab

A catalog is used to make items, not assigned by administrators or supervisors, available (viewable) to learners. Access to a catalog is provided through an assignment profile. Learners may have access to more than one catalog, although from the learner's perspective, they only see a list of available items. An item may reside in multiple catalogs.

In order for a learner to self-assign an item or self-register for a scheduled offering of an item, the item must reside in a catalog to which they have access (Figure 4).

Update the Catalog Options for the Item

↑ = Default Price for Item or Scheduled Offering

Change Catalog Prices... Apply Changes Reset

Select All / Deselect All

Catalog ID	Catalog Description	Catalog Options	Price	Remove
NASA_CATALOG	NASA	Flag: <input type="text"/> Until: <input type="text"/> (MM/DD/YYYY) Reason: <input type="text"/> Expires: <input type="text"/> (MM/DD/YYYY)	0.00 US Dollar (USD) ↑	<input type="checkbox"/>

Select All / Deselect All

Change Catalog Prices... Apply Changes Reset

Figure 4. Item Record: Catalogs Tab

An admin can flag an item in a catalog as new, featured, or revised until a given date. The item displays on the bottom of the learner's home page as well as the catalog marked by a special icon. An admin can also set an expiration date which determines when the item will be removed from a particular catalog (also requires an APM). This does not inactivate the item, but does ensure that it is not part of a particular catalog after the set expiration date.



Lab 4. Edit Items: Catalogs Tab

Step

1. Using the item created in Lab 1, select the **Catalogs** tab.
2. Click the **add one or more from list** link.
3. Enter search criteria to search for the desired catalog in which to add the item.
4. Click **Search**.
5. Click the **Add** checkbox next to all catalogs in which to add the item.



Note: The **Add Schedules** checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

6. Click the **Add** button.
7. Verify that all selected catalogs are displayed.
8. Click the **Flag Reason** drop-down menu.
9. Select one of the display options.
10. Click the **Until select date** icon.
11. Select the desired date to display the flag.
12. Enter an expiration date (if desired).



Note: This date determines when the item is to be automatically removed from the catalog.

13. Click **Apply Changes**.

Subject Areas Tab

Learners have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas (Figure 5). If an item has a subject area and is available to a learner through the catalog, the subject areas display on the Browse Catalog page.

NASA Business Rule

Administrators must associate one subject area to each item.

Curricula

Summary

Design Data

Delivery Data

Online Settings

Catalogs

Subject Areas

More Options

Edit Subject Areas for the Item

Add a Subject Area to an Item

Enter Subject Area ID or [add one or more from list](#)

Subject Area ID:

Add

Update the Subject Areas for the Item

Apply Changes

Reset

Select All / Deselect All

Subject Area ID	Title	Remove
04	Executive, Management, Leadership, and Supervisory	<input type="checkbox"/>
09	Organizational Development	<input type="checkbox"/>
10	Personal/Professional Development	<input type="checkbox"/>

Select All / Deselect All

Apply Changes

Reset

Figure 5. Item Record: Subject Areas Tab



Lab 5. Edit Items: Subject Areas Tab

Step

1. Using the item created in Lab 1, select the **Subject Areas** tab.
2. Click the **add one or more from list** link.
3. Enter search criteria for the desired subject areas to add the item.
4. Click **Search**.
5. Locate the appropriate subject area(s) in which to categorize the item.
6. Click the **Add** checkbox next to all subject areas applicable to the item.
7. Click the **Add** button.

Custom Fields Tab

NASA uses custom columns, also referred to as custom fields, to capture NASA-specific information that would not otherwise be possible if the SATERN software were implemented out of the box. The custom fields can be referenced (pre-populated list) or non-referenced (free text field). The item custom fields in SATERN (Figure 6) include:

- ♦ Filling in the custom columns is mandatory. The first 16 custom columns are required by NASA to satisfy specific reporting requirements mandated by OPM. The column numbers 5, 6, 8, 9, 10, 14, and 25 are required for NASA use and vary by Center (Figure 6). Refer to “Appendix C: Acceptable Code for Custom Fields for Data Definition Table” of the *Rules and Process Guide for Administrators*.

NASA Business Rule

Enter all non-referenced data in all upper case letters.

Column Number	Label	Value
5	Type of Training Sub-Code	01-05 (Human Resources)
6	Source of Training	03 (Non-government)
8	Academic Credit Code	05 (N/A)
9	Training Credit Type Code	03 (Continuing Education Unit)
10	Direct Cost Code	D (Contract - Funded by Agency)
14	Indirect Cost Code	A (Individual - Funded by Center)
17	PO Number	
18	Category Code	
19	Sub Category Code	
20	Funding Organization	
21	POC	
22	Budget Line Item	
23	Metrics That Matter (MTM)	
24	PPM RE-CERTIFICATION	
25	Training Vendor (ORG ID)	

Figure 6. Item Record: Custom Fields Tab



With regard to filling in the mandatory custom column information, administrators have two areas where they can enter this information: at the item level or at the scheduled offering level. Entering the information at both levels would be inefficient because the information is redundant. In addition, there is no need to fill in the custom fields in the scheduled offering because they are copied from the item when the scheduled offering is added. The exception is the Metrics that Matter (MTM) field which does not exist at the scheduled offering level.

NASA Business Rule

The custom columns are mandatory fields and must be filled in at the item level. Therefore, administrators shall:

- ◆ Enter the custom column information at the **item** level for all items.
- ◆ Enter non-referenced custom columns fields in upper case.
- ◆ Edit the scheduled offering custom columns that typically vary per scheduled offering (i.e., POC, Funding Org).

Table 2 lists the custom fields for items in SATERN.

Table 2. Item Custom Fields

Item Custom Field	Col #	Referenced
Type of Training Sub-Code	5	Yes
Source of Training	6	Yes
Academic Credit Code	8	Yes
Training Credit Type Code	9	Yes
Direct Cost Code	10	Yes
Indirect Cost Code	14	Yes
PO Number	17	No
Category Code	18	No
Sub Category Code	19	No
Funding Organization	20	No
POC	21	No

Item Custom Field	Col #	Referenced
Budget Line Item	22	No
Metrics That Matter (MTM)	23	Yes
P/PM Re-certification	24	Yes
Training Vendor (ORG ID)	25	Yes

SATERN MANDATORY FIELDS FOR ITEMS

Table 3 presents the mandatory item fields in SATERN and the location of the field by tab.

Table 3. SATERN Mandatory Item Fields

Location (Tab)	Field
Summary Tab	Title Source (Internal/External) Delivery Method Assignment Type (Only if the item is mandatory, e.g., Ethics, Security) Approval Process (Only if approval is required) Approval Required (Only if approval process ID is populated). Description (Only for items that will go into a catalog)
Design Data	Contact Hours (Only for online course and internal items) Audience (Only for items that will go into a catalog) Contact's Email
Delivery Data	Segment Description Minimum Registration (Highly recommended for Item Request APM)
Catalogs	Catalog ID (Only for items that will go into a catalog)
Subject Area	Subject Area (Only for items that will go into a catalog)
Custom Fields – Refer to Appendix C: Acceptable Code for Custom Fields of the Rules and Process Guide for Administrators for Data Definition Table	Type of Training Sub-Code Source of Training Academic Credit Code Training Credit Type Code Direct Cost Code Indirect Cost Code Metrics That Matter (MTM) Training Vendor (ORG ID) (Required for ILT courses – not required for online courses but highly recommended)



Location (Tab)	Field
Competency	Must add at least one primary competency

Lesson-Related Reports

The following are reports in SATERN that relate to this lesson:

- ◆ Item Data
- ◆ Item List

CONCLUSION

In Lesson 1, you were introduced to the main tabs of item record and the information contained in each tab. Step-by-step instructions were provided and you created a new item and entered key information.

You should now be able to:

- Describe the item key
- Describe the purpose of important item record tabs and fields
- Add an item using the provided step-by-step instructions
- Identify and populate SATERN mandatory fields for items

In the next lesson, you will learn how to use items to build curricula.



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. List the three parts of the item key:

a.

b.

c.

2. Your manager has given you the following task:

- Create a new “Communicating Effectively” item that will be scheduled for two 4-hour days.
- Inform learners what topics are covered in the course.
- Learners should receive 8 credit hours upon successful completion of this item.

Using the information from this lesson and SATERN (online help), perform the task assigned by your boss.

Lesson 2: Curricula

The goal for Lesson 2 is to provide detailed information about curricula, including how to add and work with them in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Describe the benefits of using curricula
- Describe the characteristics of curricula
- Create a curriculum using the provided step-by-step instructions
- Modify item defaults within curricula
- Set up subcurricula

CURRICULUM MAIN CONCEPTS

A curriculum is a grouping of one or more items for the purpose of assigning and tracking as a single entity. Curricula provide the functionality to recalculate required by dates on items that have been completed but must be repeated on a recurring basis.

Characteristics of Curricula

General characteristics of curricula include:

- ◆ Items can be used in one or multiple curricula with different date and requirement settings in each.



- ◆ Modifications made to a curriculum have an immediate impact on all learners who have the curriculum currently assigned.
- ◆ Curricula can be linked to a job position or assignment profile and automatically assigned when a learner is given that job position or meets the profile attributes.
- ◆ Curriculum can contain requirements (covered in the “Learning Extras” section of this guide)
 - # of Hours
 - # of Hours from an Item Pool
 - # of Items from an Item Pool

Curriculum Status

Curricula can have one of two statuses:

- ◆ Complete
- ◆ Incomplete

The *Complete* status is achieved when any of the following occur:

- ◆ All required items in the curriculum have been successfully completed and recorded
- ◆ The effective date (defined later in this lesson) of each item is in the future
- ◆ Some of the required items are complete and the remaining required items have an effective date in the future
- ◆ The requirements have been met as described on the Requirements tab (see “Learning Extras” section for more information)



The *Incomplete* status is in effect when any of the following occur:

- ◆ A new curriculum is assigned to a learner and the effective date for any required items is in the past
- ◆ Any required item has not been successfully completed and recorded
- ◆ A completed item's retraining interval date has passed
- ◆ The curriculum is modified with a new or revised item, and the effective date is not set for a future date
- ◆ The requirements have not been met as described on the Requirements tab (see "Learning Extras" section for more information)

Curriculum ID

The curriculum ID is a unique identifier in the SATERN database. The ID is a free text space; however, it is a NASA business rule to follow a strict naming convention. This will help when searching, assigning, or running reports for curricula.

NASA Business Rule

Curriculum IDs start with the Center or Discipline acronym, followed a hyphen, followed by all upper case alpha or numeric characters.

Some sample curriculum IDs include:

- ◆ ARC-DAU - DEFENSE ACQUISITION UNIVERSITY COURSES
- ◆ GRC-ETHICS – ANNUAL ETHICS TRAINING FOR FINANCIAL FILERS
- ◆ JSC-AH-JSCNEO - JSC NEW EMPLOYEE ORIENTATION



Lab 6. Add a New Curriculum

Step

1. Navigate to **Learning > Curricula**.
2. Click the **Add New** link.
3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Select a domain.
7. Select a curriculum type from the drop-down menu.
8. Leave the **Force Incomplete** checkbox unchecked.



Note: When you select the **Force Incomplete** checkbox, the system calculates whether the status should be complete or incomplete based on the learner's latest attempt at completing the item. If the learner's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

9. Click the **Add** button.

MAIN TABS OF CURRICULUM RECORD

Once a curriculum record is added to SATERN, it is organized into functional areas by tabs. These tabs provide administrators with access to fundamental information regarding the curriculum:

- ◆ Summary
- ◆ Items
- ◆ Requirements
- ◆ Subcurricula
- ◆ Documents
- ◆ Job Positions
- ◆ Assignment Profiles
- ◆ Catalogs

Summary Tab

The Summary tab contains general information about the curriculum (Figure 7).

The screenshot shows the 'Summary' tab of the 'Edit the Curriculum' window. The interface includes a tabbed menu at the top with 'Assignment Profiles', 'Catalogs', 'Summary' (selected), 'Items', 'Requirements', 'Subcurricula', 'Documents', and 'Job Positions'. Below the tabs, there are buttons for 'Apply Changes', 'Reset', 'Copy Curriculum...', and 'Delete'. The form fields include:

- Title:** A text box containing 'REQUIRED COURSES FOR NEW SUPERVISOR'.
- Description:** A text area containing 'All newly appointed supervisors must complete 40 hours of training in the first 6 months of their tenure and 80 hours of training in the first two years. At GRC, these courses are the prescribed'.
- Creation Date:** A date picker showing '10/15/2008'.
- Active:** A checkbox that is checked.
- * Domain:** A dropdown menu showing 'GRC'.
- Curriculum Type:** A dropdown menu.
- Force Incomplete:** A checkbox that is checked.

At the bottom of the form, there are buttons for 'Apply Changes', 'Reset', 'Copy Curriculum...', and 'Delete'.

Figure 7. Curriculum Record: Summary Tab

Table 4 provides the fields found on the curricula record Summary tab, a description of each field, and whether the field is displayed to the learner. A + indicates a NASA required field. A * indicates a system required field.

Table 4. Curriculum Record: Summary Tab Fields and Descriptions

Field	Description	Displays to Learner
Title +	Displays to the learner on the Curriculum Status screen.	X
Creation Date	Indicates the date the curriculum was created.	
Active	This checkbox indicates whether the curriculum is active or inactive in the database.	
Domain*	Identifies administrative ownership of the record.	
Curriculum Type	Indicates an area that the curriculum is specific to (HR, IT, Safety, etc.). Note: NASA does not use this field.	
Force Incomplete	This checkbox calculates whether the status of the curriculum should be complete or incomplete based on a learner's latest attempt at completing any required item assigned to the curriculum.	
Description +	This field is for admin informational purposes only. NASA Business Rule: Enter in sentence case.	

Items Tab

The Items tab is used to add items to the curriculum and, if necessary, modify the default settings carried over from the item record (Figure 8). There is no limit to the number of items that may be added to a curriculum.



Assignment Profiles

Catalogs

Summary

Items

Requirements

Subcurricula

Documents

Job Positions

Edit the Curriculum

Add an Item to the Curriculum

Enter Item ID or [add one or more from list](#)

TypeID

Add

Update the Items for the Curriculum

Apply Changes

Select All / Deselect All

	Item	Title		Remove
<input type="checkbox"/>	COURSE LMD-PHRSS (Rev 6/12/2007 11:02 AM America/Indianapolis)	LMD-PRACTICAL HR SOLUTIONS FOR SUPERVISORS	Edit	<input type="checkbox"/>
<input type="checkbox"/>	COURSE GRC-200556 (Rev 10/16/2008 12:56 PM America/Indianapolis)	CORE LEADERSHIP SKILLS FOR GRC'S SUPERVISORS	Edit	<input type="checkbox"/>
<input type="checkbox"/>	COURSE GRC-200474 (Rev 4/26/2006 11:00 PM America/Indianapolis)	CHIEF FINANCIAL OFFICERS BRIEFING	Edit	<input type="checkbox"/>
<input type="checkbox"/>	COURSE GRC-200479 (Rev 4/26/2006 11:00 PM America/Indianapolis)	PROCUREMENT BRIEFING	Edit	<input type="checkbox"/>
<input type="checkbox"/>	COURSE GRC-200553 (Rev 12/18/2007 12:33 PM America/Indianapolis)	EFFECTIVELY MANAGING NASA'S DYNAMIC & DIVERSE WORKFORCE IN THE 21st CENTURY	Edit	<input type="checkbox"/>

Select All / Deselect All

Apply Changes

Figure 8. Curriculum Record: Items Tab

Using the **Edit** link for each item, administrators can change:

- ◆ **Initial Assignment** (covered in Lesson 3): The amount of time a learner has to initially complete the item.
- ◆ **Retraining Assignment** (covered in Lesson 3): The amount of time a learner has to retake and complete the item once he/she successfully completes the item.
- ◆ **Effective Date**: The date when the item has an impact on the curriculum status. For example, if the effective date of an item is placed in the future, the system does not take that item into account when calculating the curriculum status of the learner. More information is provided in Lesson 3.



- ◆ **Assignment Type:** Indicates the assignment type that the item has within the curriculum. Items that do not have an assigned assignment type are treated as not required; and are not captured when the system determines the curriculum status of the learner.
- ◆ **Basis Date** (covered in Lesson 3): Defines the beginning point of the time-periods. The time-periods themselves are built using either the initial assignment information, or the retraining assignment information. Once the item is complete, it is not due again until the end of the next period. Using the basis date, you can assign learning that is due once a quarter, or once a year, but permit the learner to complete it at any time during the quarter or year.



Lab 7. Add Items to Curriculum

Step

1. Using the curriculum created in Lab 6, select the **Items** tab.
2. Click the **add one or more from list** link.
3. Enter search criteria to search for the items to include in the curriculum.
4. Click **Search**.
5. Check the **Add** checkbox next to each item to add to the curriculum.
6. Click the **Add** button.
7. In the *Update the Items for the Curriculum* section of the screen, click the **Edit** link next to the first listed item.
8. Enter an initial number.
9. Select an initial period.
10. Select an initial basis.
11. Do not enter a retraining number.
12. Enter an effective date of today.
13. Select a required assignment type.
14. Do not enter a sequence number.
15. Click **Apply Changes**.
16. Repeat steps 7-15 for each item in the curriculum.

Assignment Profiles Tab

The Assignment Profiles tab is used to add the curriculum to one or more assignment profiles. Assignment profiles are used to automatically assign curricula to learners who have a particular grouping of attributes. Assignment profiles are covered in Lesson 5.

Catalogs Tab

The Catalogs tab is used to add the curriculum to one or more catalogs. Doing so allows learners to self-assign the curriculum and all its items. Supervisors can assign curricula that they can see in their catalog to their subordinates.



Note: *If a learner self-assigns a curriculum, the learner is held to the timeframes and assignment types set by the administrator. This differs from self-assignment of an individual item when the timeframe and assignment types are ignored by SATERN.*



Lab 8. Add Curriculum to a Catalog

Step

1. Using the curriculum created in Lab 6, select the **Catalogs** tab.
2. Click the **add one or more from list** link.
3. Enter search criteria to search for the catalog in which to add the curriculum.
4. Click **Search**.
5. Check the **Add** checkbox next to each catalog to add to the curriculum.



Note: The **Add Items** checkbox should be checked if you want to add all the items of this curriculum to this catalog.

6. Click the **Add** button.
7. Verify the selected catalog is displayed in the *Update the Catalog for the Curriculum* section.
8. Click **Apply Changes**.

Sub-Curricula

The Subcurricula tab is used to create a hierarchical structure between two or more curricula (Figure 9). When the curriculum designated as the parent (main) is assigned to a learner, all items in the parent curriculum and nested (subcurricula) curricula are added to the learner's Learning Plan. The main curriculum is not *Complete* until all subcurricula are complete. Therefore, the learner must complete all required items and/or requirements within all curricula to complete the parent curriculum. Each subcurriculum status is tracked individually.

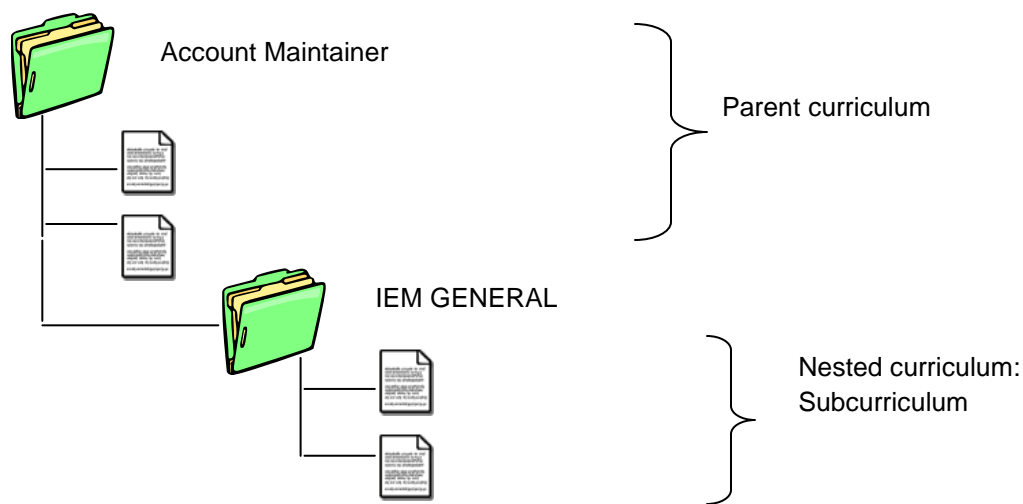


Figure 9. Hierarchy of Curriculum and Subcurriculum

If at any time an item contained in a nested curriculum gets revised or goes past its required by date, the parent curriculum along with the curriculum that contains the overdue/revised item will go to a status of *Incomplete*.



Lab 9. Adding a Subcurriculum

Step

1. Using the curriculum created in Lab 6, select the **Subcurricula** tab.
2. Click the **add one or more from list** link.
3. Enter search criteria to search for the curriculum to next under the parent curriculum.
4. Click **Search**.
5. Check the **Add** checkbox next to each curriculum to next under the parent.
6. Click the **Add** button.
7. Verify the selected catalog is displayed in the *Update the Subcurricula for the Curriculum* section.



LESSON-RELATED REPORTS

The *Curriculum Data* report in SATERN relates to this lesson.

CONCLUSION

In Lesson 2, you were introduced to key curriculum concepts. The main tabs of the curriculum and the information contained on each were covered. Step-by-step instructions were provided for adding a new curriculum, associating items to the curriculum, modifying item defaults within the curriculum, and adding subcurricula to a parent curriculum.

You should now be able to:

- Describe the benefits of using curricula
- Describe the characteristics of curricula
- Create a curriculum using the provided step-by-step instructions
- Modify item defaults within curricula
- Set up subcurricula

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. When an item is added to a curriculum, which of the following cannot be edited?

- a) Required Type
- b) Effective Date
- c) Initial Period
- d) Item ID

2. True or false:

When an item within a curriculum has a status of *Required*, an effective date must be entered.

3. True or false:

An item can be used in multiple curricula.

4. True or false:

For a curriculum status to be *Complete*, all items in the curriculum must be complete.



5. If an item in a subcurriculum is past its required by date, what happens to the parent curriculum?
- a) Has no effect on the overall curriculum
 - b) The subcurriculum status changes to incomplete
 - c) The curriculum status changes to incomplete
 - d) B & C only
 - e) All of the above

Lesson 3:

Period-Based Curricula

The goal for Lesson 3 is to provide detailed information about initial and retraining assignments within a curriculum and how to work with them in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Set up a period-based curriculum
- Explain the differences between initial basis: event and calendar
- Predict the required date of item based on the period specifications

PERIOD-BASED CURRICULUM

After an admin groups items into a curriculum, the following questions need to be answered:

- ◆ How much initial completion time should be granted to the learner?
- ◆ Does an item within a curriculum have a firm required by date for all learners regardless of when it is assigned?
- ◆ Do the items within the curriculum require retraining?

When a learner needs to complete an item on a recurring basis, it must be in a curriculum and have a retraining period.

In review of characteristics of a curriculum, each item in a curriculum has the following settings (Figure 10):

- ◆ Initial assignment
- ◆ Retraining assignment
- ◆ Effective date
- ◆ Assignment type
- ◆ Sequence number

Curricula
[Search](#) | [Add New](#) | [Help](#)

> [Search](#) > [Search Results](#) > [Edit Items](#)

Curriculum ID: DFRC-SMA-SQ-INSPECT
Title: NASA DRYDEN INSPECTION TRAINING
Item Type: COURSE
Item ID: DFRC-SMA-SQ-INSPECT
Revision Date: 3/5/2009 05:24 PM America/Indianapolis
Revision Number:
Item Title: NASA DRYDEN INSPECTION TRAINING
[Return to Item Data](#)

Edit the Items for the Curriculum
[Apply Changes](#) [Reset](#)

**** = Required if either Initial Basis or Retraining Basis is calendar based.**

Initial Assignments:

Initial Number: (1000,001)
Initial Period:
Threshold: ☐ Entire Period ☒ Days

Initial Basis: ☐ Calendar ☒ Event

Retraining Assignments:

Retraining Number: (1000,001)
Retraining Period:

Retraining Basis: ☐ Calendar ☒ Event

**** Basis Date:** (MM/DD/YYYY)

Effective Date: (MM/DD/YYYY)

Assignment Type:

Sequence Number: (1000)

Figure 10. Edit Item Settings within a Curriculum Record



Event vs. Calendar Basis

Administrators have two options available when setting initial and retraining assignment, initial basis: event and calendar.

Initial basis event uses the assignment date of the curriculum (item) to determine the original required by date (initial assignment) and the Learning History completion date to determine the next required by date (retraining assignment).

Initial basis calendar uses a basis date which is set at the item level within a curriculum. This allows administrators to set a fixed required by date for initial assignments and intervals for retraining periods.

Basis: Event

Using *basis: event*, SATERN calculates the required date by completing the current period and then adding the initial/retraining assignment. The trigger for *initial basis: event* is the assignment date (initial assignment) and the *retrain basis: event* is the Learning History completion date (retraining assignment). Using the *days*, *weeks*, *months*, *quarters*, or *years* periods, SATERN does not start counting until the current day, week, month, quarter, or year ends. Therefore, learners receive the rest of the current period plus all of the specified period.

For example, a learner is assigned an item with an initial assignment of 30 days, *initial basis: event*, and an assignment date of 10/16/2008. SATERN calculates a required by date of 11/16/2008. It completes the current day period 10/16, then counts 30 days. Using the same dates but setting an initial assignment of one month, SATERN generates a required by date of 11/30/2008. It completes the current month period, October, then counts one month.



Finally, using the same dates but changing the initial assignment to one year, SATERN calculates a required by date of 12/31/2009. It completes the current year period, 2008, then counts one year.

Basis: Calendar

Calendar basis, for retraining periods, allows administrators to create different intervals using the basis date. This prompts the system to start its date calculations from that basis date instead of January 1st. This can be useful for training that is due at the end of a fiscal year.

An admin specifies the start of the calendar basis date in the item details. In the following grid, the basis date is 10/01/2008 and has calendar basis 6-month initial period. Therefore, SATERN creates intervals starting on 10/01/2008, each running for six months.

Interval 1	{	October 2008	November 2008	December 2008
		January 2009	February 2009	March 2009
Interval 2	{	April 2009	May 2009	June 2009
		July 2009	August 2009	September 2009

A learner completes an item on 02/11/2009 with a retraining assignment of six months and the above *retraining basis: calendar*. SATERN generates a new required by date of 09/30/2009. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

If the completion date is 04/15/2009, SATERN calculates a new required by date of 03/31/2010. It completes the current calendar period, Interval 2, and then looks for the end of the next interval.

For initial assignments, if administrators use *initial basis: calendar*, they can set a fixed required by date for all learners regardless of what date the curriculum (item) is assigned (Figure 11).

Edit the Items for the Curriculum

**** = Required if either Initial Basis or Retraining Basis is calendar based.**

Initial Assignments:

Initial Number: (1000,001) Initial Period: Threshold: ☒ Entire Period ☐ Days

Initial Basis: ☒ Calendar ☐ Event

Retraining Assignments:

Retraining Number: (1000,001) Retraining Period:

Retraining Basis: ☐ Calendar ☒ Event

**** Basis Date:** (MM/DD/YYYY)

Figure 11. Edit Item Settings within a Curriculum

Using the settings in Figure 11, a learner who has this item assigned through this curriculum between the dates of 10/01/2008 and 09/30/2009 would have a required by date of **09/30/2009**.

If a learner has the item assigned close to the fixed required by date, the admin can configure the item to give learners the rest of the current period plus the next full period. This is accomplished by setting the **threshold days** with the number of days into the period, that when an assignment occurs, it should skip the remainder of the current period set the required by date to the end of the next full period (Figure 12).

Edit the Items for the Curriculum

Apply Changes Reset

**** = Required if either Initial Basis or Retraining Basis is calendar based.**

Initial Assignments:

Initial Number: (1000,001) Initial Period: Threshold: ☐ Entire Period ☒ 335 Days

Initial Basis: ☒ Calendar ☐ Event

Retraining Assignments:

Retraining Number: (1000,001) Retraining Period:

Retraining Basis: ☐ Calendar ☒ Event

**** Basis Date:** (MM/DD/YYYY)

Figure 12. Edit Item Settings within a Curriculum

Using the settings in Figure 12, a learner who has this item assigned through this curriculum between the dates of 10/01/2008 and 08/31/2009 would have a required by date of 09/30/2009.

Learners who have the item assigned between the dates of **09/01/2009** and **09/30/2009** would have a required by date of **09/30/2010**.

Effective Date

The effective date identifies when the curriculum status changes to *Incomplete* if the learner does not complete a required item. This is equivalent to a grace period.

For example, the effective date is set in the future to allow learners who completed the original version of an item time to complete the revised item. Since the effective date is set in the future, the new version will not affect the completion status of the curriculum until it becomes effective. Therefore, the learner's curriculum status does not revert to *Incomplete*. Effective dates only affect *Incomplete* and *Complete* curricula status and does not interfere or change required dates.



Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the learner (i.e., Required, Optional, Recommended, etc.). A learner must complete all required items (and any requirements on the Requirements tab of the curriculum) to obtain *Complete* curriculum status.

Sequence Number

Sequence numbers designate the order that SATERN schedules instructor-led items within a curriculum. This field is required when using the Curriculum Scheduling tool. This can also be used to present the items in a specific order within the curriculum to administrators (this does not work with learners).



Lab 10. Setting Item Periods within a Curriculum

Step

1. Using the curriculum created in Lab 6, select the **Items** tab.
2. Click the **Edit** link of your first listed item.
3. In the *Initial Assignments* section, enter an initial number.
4. Select an initial period.
5. Select an initial basis.



Note: If you select **Calendar** as the initial basis, select a **Threshold** (*Entire Period* or *Days*).

6. In the *Retraining Assignments* section, enter a retraining number.
7. Select a retraining period.



Note: Once a learner completes this item, he/she will be required to complete this item again within the set retraining assignment timeframe.

8. Select a retraining basis.
9. Enter an effective date.
10. Select an assignment type.
11. Click the **Apply Changes** button.



Lab 11. Setting a Fixed, Initial Required By Date

Step

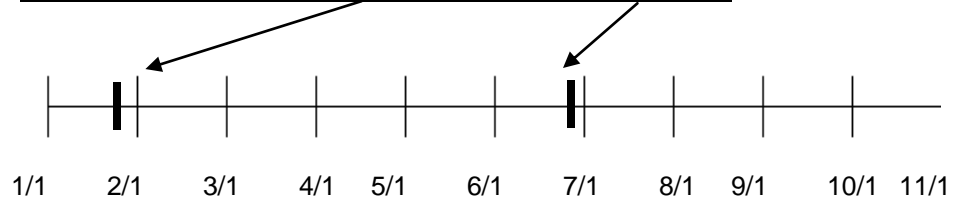
1. Using the curriculum created in Lab 6, select the **Items** tab.
2. Add an item to the curriculum.
3. Click the **Edit** link of that new item.
4. In the *Initial Assignments* section, enter an initial number.
5. Select an initial period.
6. Select the **Calendar** initial basis.
7. Select the **Days** threshold.
8. Enter the number of days in the **Days** textbox.
9. Select a retraining basis.
10. Enter an effective date.
11. Select an assignment type.
12. Click the **Apply Changes** button.



Event and Calendar Basis Activity

Example item:

Initial basis:	Event	Required Date
Initial period:	Months	06/30/2010
Initial number:	5	
Assignment date:	01/24/2010	



Item A

Initial basis:	Event	Required Date
Initial period:	Years	
Initial number:	2	
Assignment date:	01/24/2010	



Item B – Entire Period is Selected

Initial basis:	Calendar	Required Date
Basis date:	10/01/2010	
Initial period:	Months	
Initial number:	5	
Assignment date:	01/24/2011	





Event and Calendar Basis Activity (continued)

Item C

Initial basis:	Event	Required Date
Initial period:	Days	
Initial number:	365	
Assignment date:	01/24/2010	



Item D – Threshold of 180 days

Initial basis:	Calendar	Required Date
Basis date:	10/01/2010	
Initial period:	Years	
Initial number:	2	
Assignment date:	01/24/2011	





CONCLUSION

In Lesson 3, you were introduced to the functionality of period based curricula. Using initial basis: calendar or event, an admin specifies the amount of time a learner has to complete an item once assigned as part of a curriculum. If recurring training is necessary, the item must be assigned as part of a curriculum. Finally, subcurricula provide the ability to group curricula into a hierarchical structure.

You should now be able to:

- Set up a period-based curriculum
- Explain the differences between initial basis: event and calendar
- Predict the required date of item based on the period specifications



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. What does the effective date of an item within a curriculum impact?

- a) Required by date
- b) Curriculum status
- c) Both A & B
- d) None of the above

2. What is the major difference between initial basis: event and calendar basis?

3. True or false:

A fixed required by date can be set for an item within a curriculum.



Notes

Lesson 4:

Manual Learning Assignments

The goal for Lesson 4 is to provide detailed information about manually assigning training to learners in SATERN. Now that items and curricula records have been created, you are ready to make the necessary manual learning assignments to your learners.

NASA Business Rule

Training Officers at the Training Office are responsible for assigning mandatory Agency-wide training within SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Assign an item and curriculum directly to a learner
- Batch assign an item/curriculum to a group of learners

LEARNING ASSIGNMENT MAIN CONCEPTS



This lesson focuses on the manual methods of assigning learning to learners. Both items and curricula can be assigned through manual assignment methods.

The admin can make manual learning assignments using:

- ◆ Direct assignment of an item to an individual learner
- ◆ Direct assignment of a curriculum to an individual learner
- ◆ Batch assignments of items and curricula to a group of learners

ASSIGNING AN ITEM USING THE LEARNING PLAN TAB

When an admin needs to assign an item to one learner, the easiest way to accomplish this task is navigating to the Learning Plan tab of the learner record (Figure 13). This is called assigning a free-floating item. Free-floating item assignments are a one-time requirement. There are no retraining periods associated with this type of assignment. If a free-floating assignment is made by an admin, the item displays on the learner's Learning Plan, even if they have previously completed the item (successful Learning History record). Also, if an admin assigns an item to a learner, neither the learner nor his/her supervisor can remove the assignment.

Summary

Learning Plan

Learning History

Competencies

More Options

Edit the Learner

Assign Learner Needs

Enter items or [add one or more from list](#)

Assign Learning Needs...

Type

Item ID

Assign Date
(MM/DD/YYYY)

Update the Learning Plan for the Learner

View: ☐ All ☒ Needs ☐ Requirements

Sort By:

Show Duplicates: Yes

[Select All](#) / [Deselect All](#)

Item	Title	Add User	Learning Information			Remove
COURSE KSC-CLA-CPMWMS (Rev 6/13/2008 12:46 PM America/Indianapolis)	KSC CLFICT PREVENTION AND MANAGEMENT IN THE WORKPLACE FOR MANAGERS AND SUPERVISORS	Chase Winters	Req. Date: <input type="text"/>	Assign. Type: <input type="text"/>	<input type="checkbox"/>	
			Days Rem:	Compl Date:		
			Curriculum ID:	Failure Date:		
				Origin: Directly Assigned		
				Assigned: 3/25/2010		
COURSE KSC-FPS-CLFMSTL (Rev 9/4/2009 08:20 AM America/Indianapolis)	KSC CREATIVE LEADERSHIP FOR MANAGERS, SUPERVISORS, & TEAM LEADERS	Chase Winters	Req. Date: <input type="text" value="3/31/2010"/>	Assign. Type: <input type="text" value="REQUIRED (Required)"/>	<input type="checkbox"/>	
			Days Rem: 6	Compl Date:		
			Curriculum ID:	Failure Date:		
				Origin: Directly Assigned		
				Assigned: 3/25/2010		

[Select All](#) / [Deselect All](#)

Figure 13. Learner Record: Learning Plan Tab



Using the **Type** and **Item ID** fields or the **add one or more from list** link, admins can add items to the learner's Learning Plan. Once added, the admin can change the required date and assignment type (Figure 14).

Apply Changes | Reset

Select All / Deselect All

Item	Title	Add User	Learning Information		Remove
COURSE KSC-CLA-CPMWMS (Rev 6/13/2008 12:46 PM America/Indianapolis)	KSC CONFLICT PREVENTION AND MANAGEMENT IN THE WORKPLACE FOR MANAGERS AND SUPERVISORS	Chase Winters	Req. Date: 04/12/2010	Assign. Type: REQUIRED (Required)	<input type="checkbox"/>
			Days Rem:	Compl Date:	
			Curriculum ID:	Failure Date:	
				Origin: Directly Assigned	
				Assigned: 3/25/2010	
COURSE KSC-FPS-CLFMSTL (Rev 9/4/2009 08:20 AM America/Indianapolis)	KSC CREATIVE LEADERSHIP FOR MANAGERS, SUPERVISORS, & TEAM LEADERS	Chase Winters	Req. Date: 3/31/2010	Assign. Type: REQUIRED (Required)	<input type="checkbox"/>
			Days Rem: 6	Compl Date:	
			Curriculum ID:	Failure Date:	
				Origin: Directly Assigned	
				Assigned: 3/25/2010	

Figure 14. Learner Record: Learning Plan Tab



Lab 12. Assign Items Directly to Learner Record

Step

1. Navigate to **Learner Management > Learners**.
2. Enter search criteria to search for the learner to add the item.
3. Click **Search**.
4. Click the **Edit** icon.
5. Select the **Learning Plan** tab.
6. Click **add one or more from list**.
7. Enter search criteria to search for the item to add.
8. Click **Search**.
9. Click the **Add** checkbox next to the item(s) to add.
10. Click the **Add** button.
11. Locate the item in the displayed list.
12. Select an assignment type.



Note: *If you selected the required assignment type, enter a required by date.*

13. Click the **Apply Changes** button.

ASSIGN A CURRICULUM

When an admin needs to assign a curriculum to one learner, the easiest way to accomplish this task is by navigating to the Curricula tab in the learner record (Figure 15).

Summary Phone Numbers Custom Fields Learning Plan Learning History **Curricula**

Edit the Learner

Add a Curriculum to the Learner

Enter 'Curriculum ID' and 'Assign Date' or [add one or more from list](#)

Curriculum ID Assign Date (MM/DD/YYYY)

Add

Attach Job Related Curricula

Update the Curricula for the Learner

Apply Changes Reset

Select All / Deselect All

Curriculum ID	Title	Status	Expiration Date	Next Action Date	Assign Date (MM/DD/YYYY)	Add User	Remove
HQ-TRAVEL-CARD	AGENCY MANDATORY TRAVEL CARD COURSE	Complete	9/2/2012	9/2/2012	<input type="text" value="3/25/2010"/>	Admin cwinters, Winters, Chase	Details <input type="checkbox"/>
HQ_CURR101	HQ Safety Curriculum	Incomplete	N/A	4/24/2010	<input type="text" value="3/25/2010"/>	Admin cwinters, Winters, Chase	Details <input type="checkbox"/>

Select All / Deselect All

Apply Changes Reset

Figure 15. Learner Record: Curricula Tab

Using the **Curriculum ID** field or the **add one or more from list** link, the admin can assign curricula to the learner. When a curriculum is assigned to a learner, the system checks the learner's Learning History. If any of the items found in the curriculum are also found in the learner's Learning History (as previously completed for credit), the system will flag the item as completed in the new curriculum and will not place the item onto the learner's Learning Plan (unless there is a retraining period). Once the curriculum assignment is made, the admin can change the required date of the items assigned via the curriculum on the Learning Plan tab.



Lab 13. Assign Curricula Directly to Learner Record

Step

1. Navigate to **Learner Management > Learners**.
2. Enter search criteria to search for the learner to add the curriculum.
3. Click **Search**.
4. Click the **Edit** icon.
5. Select the **Curricula** tab.
6. Click **add one or more from list**.
7. Enter search criteria to search for the curriculum to add.
8. Click **Search**.
9. Click the **Add** checkbox next to the curricula to add.
10. Click the **Add** button.
11. Verify the curricula are added to the learner record.
12. Select the **Learning Plan** tab.
13. View the items that are added based on the curricula added.

BATCH LEARNING ASSIGNMENTS

If an admin needs to do a one-time manual batch assignment of one or more items or curricula to a group of learners, it is easiest to use the Learner Needs Management tool (Figure 16). The admin is presented with a wizard containing the step-by-step process to make batch assignments. Using this tool, the admin has the ability to select multiple learners and assign one or more items or curricula to the selected learners.

The screenshot shows the 'Learner Needs Management' interface. At the top, there is a title bar with 'Learner Needs Management' and a 'Help' link. Below the title bar, a breadcrumb trail indicates '> Step 1'. The main heading for this step is 'Step 1: Select Management Action'. On the right side of this section is a 'Next' button. The central area contains a list of ten radio button options arranged in two columns: 'Add Curricula', 'Add Items', 'Add Competency Profiles', 'Add Competencies', 'Add Job-related Curricula', 'Add Job-related Competency Profiles', 'Remove Curricula', 'Remove Items', 'Remove Competency Profiles', and 'Remove Competencies'. The 'Add Curricula' option is selected.

Figure 16. Learner Needs Management Tool: Curricula Assignment

The Learner Needs Management tool has full learner search capabilities using the **add one or more from list** link (Figure 17).

The screenshot shows the 'Learner Needs Management' interface at Step 2. The title bar remains the same. The breadcrumb trail now shows '> Step 1 > Step 2'. The main heading is 'Step 2: Select Learners'. On the right side of this section are 'Previous' and 'Next' buttons. Below the heading, there is a red asterisk followed by the text '* = Required Fields'. There are two sub-sections: 'Add Learners' and 'Edit Learners'. Under 'Add Learners', there is a text input field with the placeholder 'Enter Learner ID or [add one or more from list](#)'. Below this is a label '* User Name:' followed by another text input field. To the right of the 'User Name' field is an 'Add' button. The 'Edit Learners' section is currently empty, showing only the heading.

Figure 17. Learner Needs Management Tool: Search for Learners



Lab 14. Assign an Item Using Learner Needs Management Tool

Step

1. Navigate to **Learner Management > Tools > Learner Needs Mgmt.**
2. Click the **Add Items** radio button.
3. Click **Next**.
4. Click the **add one or more from list** link.
5. Enter search criteria to search for the learners to have the item added, and click **Search**.
6. Click the **Add** checkboxes next to each learner who needs the item.
7. Click the **Add** button.
8. Click **Next**.
9. Click **add one or more from list**.
10. Enter search criteria to search for the item to add, and click **Search**.
11. Click the **Add** checkbox(es) next to the item(s) to add.
12. Click the **Add** button.
13. Click **Next**.
14. Select the assignment type from the drop-down menu as appropriate.
15. Note the assign date, which defaults to the current date. Modify as appropriate.
16. Click **Next**.
17. Note the required date, which defaults to the current date. Modify as appropriate.
18. Click **Run Job Now**.



LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- ◆ Learning Needs
- ◆ Learning Plan
- ◆ Curriculum Status
- ◆ Curriculum Item Status

CONCLUSION

In Lesson 4, you were introduced to making manual assignments to learners. An admin can assign one or more items directly to a learner from the Learning Plan tab within a learner record. An admin can assign one or more curricula directly to a learner from the Curricula tab within a learner record. An administrator can assign one or more items to a group of learners using the Learner Needs Management (Manage Learner Needs) tool.

You should now be able to:

- Assign an item and curriculum directly to a learner
- Batch assign an item/curriculum to a group of learners



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

Administrators can assign multiple curricula to a learner from within a learner record.

2. True or false:

Administrators can assign multiple items to multiple learners from within the item record.

3. True or false:

The Learner Needs Management (Manage Learner Needs) tool can be used to batch assign items and curricula.

Lesson 5:

Automated Learning Assignments

The goal for Lesson 5 is to provide detailed information about setting up and propagating automated learning assignments to learners in SATERN. Now that you have created item and curriculum records, you are ready to assign learning assignments to your learners.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Add a curriculum to an assignment profile and propagate to current learners
- Describe how the assignment profile synchronization Automatic Process Manager (APM) works

LEARNING ASSIGNMENT MAIN CONCEPTS



This lesson focuses on the automated methods of assigning learning to learners. Only curricula can be assigned through automated assignment methods. There is no way in SATERN to automate the assignment of a “free-floating” item; however, it is possible to set up a curriculum that contains one item, if necessary.

The admin can set up automated learning assignments using assignment profiles.

CATALOGS

A catalog is used to make items and curricula that are not part of a Learning Plan viewable to users. Access to one or more catalogs is based on attributes in an assignment profile.

Situation: An item or curriculum may reside in more than one catalog. In order for a user to self-assign an item, curriculum, or self-enroll in a scheduled offering of an item, the item or curriculum must reside in a catalog to which the user has access.

NASA Business Rule

Only admins with the “All” role or “Regional Admin Level 1” role have the authorized workflow to create an assignment profile. Therefore, any catalog creations for the Disciplines, (e.g., ITS, SMA) must be created by an admin at the NASA Shared Services Center (NSSC), who has the authorized workflow. Assignment profiles for Center catalogs will be created by an admin at the Center who has the authorized workflow. The assignment profile shall follow the naming convention listed in the *Data Entry and Data Consistency section of the Business Rules Guide*.

ASSIGNMENT PROFILES

The assignment profile functionality provides a way to automate assigning curricula to a group of learners who share the same training needs. The assignment profile uses the common attributes of a group of learners to assign curricula. One useful way to group learners at NASA is to assign training based on information contained in a learner’s custom fields. For example, if you want to push out training to all supervisors, you can set up an assignment profile containing all supervisors at a Center and assign a curriculum



to that group. In addition to being efficient, the group that you defined in the assignment profile is automatically updated as members of that group take on or lose a supervisory role. SATERN will add or delete the curriculum from the learner's Learning Plan based on the code or codes you used when you set up the assignment profile.

Situation: It is desirable for NASA to utilize the assignment profile functionality; however, according to the Privacy Act of 1974, as amended, "disclosure of Agency records that contain individually identifiable information is prohibited." The Act restricts an employee's personal data to only those administrators with a "need to know." SATERN currently contains individually identifiable information but that data is restricted to Level 1 Regional Administrators only.

Normally, to add an assignment profile based on learner custom column codes, administrators would go to the Assignment Profile tab under Resources and follow the process: click **Add New**, search for and select a group of learners. To comply with the Privacy Act of 1974, however, the search custom fields functionality has been turned off for all administrators and thus even Level 1 administrators may not search custom fields to identify or group learners. As a result, an Agency process is needed to enable administrators to utilize the assignment profiles functionality while ensuring compliance with the Privacy Act of 1974 provisions.

Agency Process: To enable administrators to utilize SATERN's assignment profile functionality in light of the Privacy Act of 1974 as amended, only SATERN Level 1 Regional Administrators will have the ability to preview the learners that match the assignment profile. Level 1 Administrators can also use the Learner Reference Code Values table in the Appendix of the Rules and Process Guide to select a group of learners for use in assignment profiles where a

referenced learner attribute does not exist (i.e., NASA Class Code). The following section contains SATERN screen shots that describe the process that can be used.

Assignment Profile for Catalogs

Access to view catalogs is given through the assignment profile process. Only administrators with the ALL or Level 1 (RA-1) have the workflows to create assignment profiles. Therefore, Center Level 1 Administrator will be responsible for creating and propagating assignment profiles for their Center catalogs. NSSC will be responsible for creating and propagating the assignment profile for the NASA and Discipline catalogs. Naming convention for catalog assignment profiles should follow the guidelines under the “Data Entry and Data Consistency” section on p. 9 of the Rules and Process Guide (e.g., NASA-CATALOG-ALL, GRC-CATALOG-CS).

To add a new assignment profile:

1. Navigate to **Learner Management > Assignment Profiles** (Figure 18).

Figure 18. Learner Management > Assignment Profiles

2. Click **Add New**.

The add new assignment profiles screen displays (Figure 19).

Figure 19. Add New Assignment Profiles Screen

3. Enter the assignment profile ID.
4. Enter a description for the assignment profile.
5. Select a domain.
6. Enter the e-mail address of person responsible for this assignment profile.
7. Click the **Add** button.

The new assignment profile record is displayed (Figure 20).

Figure 20. New Assignment Profile Record

8. Select the **Domains** tab.
9. Add a domain to the assignment profile.



10. Add an attribute or attributes to specifically identify the group:
 - a. Give the group a number in the Group ID field.
 - b. Select the attribute (in our example, Supervisory Status) from the drop-down menu.
 - c. Click **Apply Changes**.
11. Select **Values** for the attribute.
12. Refer to the Learner Custom Fields Reference Code Values for code definitions, and add an attribute value. You can also click **add one or more from list** to view a list of values.
13. Click **Apply Changes**.



Note: Some of the values for a given attribute are not contained in SATERN. Refer to the *Learner Custom Fields Guide to Human Resources Reporting* located in Appendix C of the *Rules and Process Guide*. This document contains the allowable values for each learner custom field. Level 1

Administrators can refer to the *Rules and Process Guide* when creating an assignment profile or for reporting on the learner custom fields.

14. Click **Return to the Main Attributes Page**.

To verify your group of learners:

1. Scroll down and see the Learner Tools section.
2. Click **Assignment Profile Learner Preview** to preview the learners matching your defined profile.



Note: Only Level 1 Administrators have access to the **Learner Preview** button.

To add a course, curriculum, or competency profile to the group you defined in the assignment profile, administrators add it to the assignment profile just as they would assign a curriculum to a learner. The only difference is that they should click the **Propagate Assignment Profile...** button instead of assigning it to the learner's Learning Plan.

GROUPS AND ATTRIBUTES

For each assignment profile, one or more groups of attributes may be created; the groups are formed by the group number of the attributes. If you have multiple attributes with a group number of 1, then the system creates an “and” relationship between those attributes. If you create a second group of attributes with a group number of two, it would create an “or” relationship between the two groups. A learner’s attributes must match one value from each of the attributes in any one group in order for the learner to be assigned the curricula in the assignment profile.



Note: *The learner’s record must also reside on one of the domains listed on the Domains tab of the assignment profile record.*

Attributes that may be added to groups include:

- ◆ Important fields on the Summary tab of the learner record such as:
 - Learner ID
 - Address
 - City
 - State
 - Country
 - Gender
 - Domain
 - Organization
 - Employee Status
 - Employee Type
 - Job Position
 - Hire Date
 - Supervisor ID

- ◆ Configurable fields on the Custom Fields tab of the learner record, for example, UUPIC, NASA Class Code, and Degree Level
- ◆ Item completion (may be used to find learners who have a particular item in their Learning History)

Once an attribute has been added to a group, the specific values for the attribute must also be added. An operator must be selected to restrict these values. Figure 21 shows the available operators for assignment profiles.

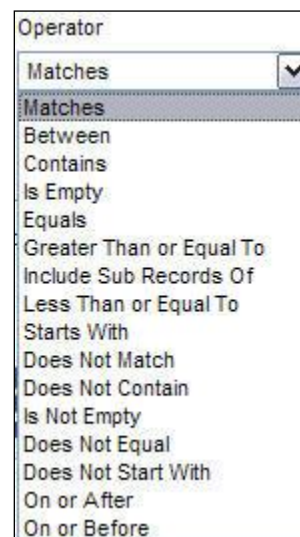


Figure 21. Assignment Profile Attribute Operators

Table 5 lists and defines the assignment profile attribute operators.

Table 5. Assignment Profile Operators and Definitions

Operator	Definition
Matches	Allows multiple values to be entered. Selected learner attribute must exactly match one of the entered values.
Between	Used to set a numeric or date range.
Contains	Entered value must be part of selected learner attribute.
Is Empty	Selected learner attribute must be null.
Equals	Allows one value to be entered.

Operator	Definition
Greater Than or Equal To	Used to set a numeric value and all values greater than that number.
Include Sub Records Of	Used to include subrecords, if any, of the selected value.
Less Than or Equal To	Used to set a numeric value and all values less than that number.
Starts With	Entered value must be the first part of a selected learner attribute.
Does Not Match	Allows multiple values to be entered. Selected learner attribute must not have one of the entered values.
Does Not Contain	Entered value must not be part of selected learner attribute.
Is Not Empty	Selected learner attribute must not be null.
Does Not Equal	Allows one value to be entered. Entered value must not be part of selected learner attribute.
Does Not Start With	Entered value must not be the first part of a selected learner attribute.
On or After	Used to set a specific date and dates in the future.
On or Before	Used to set a specific date and dates in the past.

The defined attributes are then listed in the *Update the Attributes for the Assignment Profile* section of the screen. The selected operator for each attribute is also listed (Figure 22).

Update the Attributes for the Assignment Profile

Users must meet the requirements of any one group in order to be included in the assignments of this profile.

Apply Changes

Reset

[Select All](#) / [Deselect All](#)

Group	Attribute	Operator		Remove
1	Organization ID	Include Sub Records Of	Values	<input type="checkbox"/>
2	Domain ID	Include Sub Records Of	Values	<input type="checkbox"/>
3	Hire Date	Between	Values	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

Apply Changes

Reset

Figure 22. Assignment Profile Attributes



Activity

Does the learner match the profile?

Domains tab:

- ◆ KSC – Kennedy Space Center
- ◆ JSC – Johnson Space Center

Attributes tab

Group	Attribute	Operator	Value
1	Pay Plan/Grade	Exact	GS-15
1	Hire date	Between	01/01/2000 – 12/31/2010

Learners

Learner	Learner Attributes	Match?
Tom Smith	Domain: KSC Pay Plan/Grade: GS-15 Hire date: 06/15/2008	
Jane Williams	Domain: JSC Pay Plan/Grade: GS-15 Hire date: 04/05/2007	
Bob Thomas	Domain: MSFC Pay Plan/Grade: GS-15 Hire date: 07/08/2007	
Jan Jones	Domain: KSC Pay Plan/Grade: GS-14 Hire date: 10/30/2006	

Once you have the Domain tab and Attributes tab populated with the desired data, use the **Assignment Profile Learner Preview** button to see which learners currently match your settings. This helps to verify that you have the correct target audience for the curricula assignment.

Associating Curricula

Curricula are added to the assignment profile from the Curricula tab (Figure 23).

Assignment Profiles
[Search](#) | [Add New](#) | [Help](#)

[> Search](#) > [Search Results](#) > [Edit Curricula](#)

Assignment Profile ID: GSFC-ETNEAP
Description: GSFC Ethic Training for NASA Employees Assignment Profile
Status: Propagation Required

[Propagate Assignment Profile...](#)

Role
Review

Summary
Domains
Attributes
Curricula
Cpty Profiles
Catalogs

Edit the Assignment Profile

Add a Curriculum to the Assignment Profile

Enter Curriculum ID or [add one or more from list](#).

Curriculum ID: [Add](#)

Update the Curricula for the Assignment Profile

[Apply Changes](#) [Reset](#)

[Select All](#) / [Deselect All](#)

Curriculum ID	Title	Status		Remove/Undo Action
GSFC-ETNE	GSFC ETHICS TRAINING FOR NASA EMPLOYEES	Valid	Details	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

[Apply Changes](#) [Reset](#)

Figure 23. Assignment Profile Record: Curricula Tab

To “push” the curricula out to learners that currently match the assignment profile criteria, click the **Propagate Assignment Profile** button. Manual propagation only needs to be done when the assignment profile is initially created or if the domains or attributes change.

Once the assignment profile is propagated, the Assignment Profile Synchronization APM runs on a regularly scheduled basis. The Assignment Profile Synchronization APM looks at every active learner record to see if there are any learners who now meet or no



longer meet the assignment profile criteria. For learners who now meet the criteria, the curricula assignment is made; for learners who no longer meet the criteria, if the curricula assignment was originally made through the assignment profile, the curricula is removed (unassigned) from the learner.



Lab 15. Add a New Assignment Profile

The goal of the assignment profile created in the next lab is to assign all learners who have a supervisor status of *Supervisor* or *Manager*, a pay plan/grade of GS-15, an employee status of full-time, and are in the Kennedy Space Center (KSC) domain or any sub-domains of KSC.

Step


1. Navigate to **Learner Management > Assignment Profile**.
2. Click **Add New**.
3. Enter an assignment profile ID.
4. Enter a description.
5. Select a domain.
6. Click the **Add** button.
7. Select the **Domains** tab.
8. Search for the KSC domain.
9. Select **KSC** and sub-domains.
10. Click **Add**.



Note: You can also use the **add one or more from list** link to search for and select the domain.

11. Select the **Attributes** tab.
12. Enter a **1** in the group number.
13. Select the **Supervisor Status** attribute from the **Attribute** drop-down menu.
14. Select **Equals** from the **Operator** drop-down menu.



15. Click the **Add** button.
16. Click the **Values** link to select specific values for the attribute you selected.
17. Click the **add one or more from list** link to search for and select an attribute.
18. Check the **Select** checkbox for the *Supervisor or Manager* value.
19. Click the **Add** button.
-  **Note:** If you know the exact attribute value, enter it in the Value textbox, and click **Add**.
20. Click the **Return to Main Attributes Page** button.
21. Enter a **1** in the group number.
22. Select the **Pay Plan/Grade** attribute from the Attribute drop-down menu.
23. Select **Equals** from the Operator drop-down menu.
24. Click the **Add** button.
25. Click the **Values** link to select specific values for the attribute you selected.
26. Click the **add one or more from list** link to search for and select an attribute.
27. Check the **Select** checkbox for the GS-15 Pay Plan/Grade.
28. Click the **Add** button.
29. Click the **Return to Main Attributes Page** button.
30. Enter a **1** in the group number.
31. Select the **Employee Status** attribute from the Attribute drop-down menu.
32. Select **Equals** from the Operator drop-down menu.



33. Click the **Add** button.
34. Click the **Values** link to select specific values for the attribute you selected.
35. Click the **add one or more from list** link to search for and select an attribute.
36. Check the **Select** checkbox for the FULL-TIME Employee Status.
37. Click the **Add** button.
38. Click the **Return to Main Attributes Page** button.
39. Repeat steps 12-20 for each attribute you want to add to the profile.
40. Select the **Curricula** tab.
41. Click **add one or more from list**.
42. Search for curricula.
43. Select the **Add** checkbox for each curricula you would like to assign.
44. Click **Add**.
45. Repeat steps 41-44 for each curriculum to add to the profile.
46. Click the **Propagate Assignment Profile** button. The system may require you to schedule this as a background job. Once this job runs, all learners with the attributes you specified will be assigned the selected curricula.



LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- ◆ Learning Needs
- ◆ Learning Plan
- ◆ Curriculum Status
- ◆ Curriculum Item Status

CONCLUSION

In Lesson 5, you were introduced to automated learner assignments. Curricula can be associated to a job position and assignment profiles and automatically assigned to learners whose attributes match the criteria.

You should now be able to:

- Add a curriculum to an assignment profile and propagate to current learners
- Describe how the assignment profile synchronization automatic process (APM) works



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

An assignment profile must be propagated when it is created in order to “push” out the curriculum to learners.

2. True or false:

At least one domain, user attribute, and value must be selected in order to create a valid assignment profile.

3. True or false:

The system will unassign curricula from learners that no longer match the assignment profile criteria.



Notes

Lesson 6:

Record Learning Events

The goal of Lesson 6 is to provide a general understanding of the Learning Event Recorder. Recording a learning event creates a Learning History record for learners and allows those learners who successfully complete an item to generate a certificate of completion.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Identify the two types of learning events that can be recorded
- Record a learning event
- View the learning event in the Learning History

LEARNING EVENT MAIN CONCEPTS

In the Learning Event Recorder section of the Learner Management menu, an admin may record the completed learning of all learners for whom they have administrative rights. When an admin has been informed of an external event, item, or scheduled offering completion, he/she uses the Learning Event Recorder to capture this information. Once the event is recorded, a Learning History record is created for the learner. If an error is recorded, the administrator may have the ability to edit it with the Learning Event Editor (if he/she has been given the appropriate workflow).



A learning event is the record of:

- ◆ A completed item
- ◆ An unsuccessful attempt to complete an item
- ◆ A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

TYPES OF LEARNING EVENTS

There are two types of learning events:

- ◆ Item-based events (including scheduled offerings)
- ◆ External events

Item-Based Events

Items are the primary events found in the list of learning events for learners. Learning events for items include those that were created as scheduled offerings and those with online content where the system records the learning event when the learner completes the content. All items may have a learning event recorded against them for any learner, even if the item was not a part of his or her Learning Plan.

External Events

An external event would be an event completed by a learner or group of learners that an item has not been created for and an external training request process has not carried out. This external event allows for a description and comment field to further identify the nature of the training.

DATA RECORDED IN A LEARNING EVENT

The following information can be captured when recording the learning event:

- ◆ Learners to receive a completion status for the item
- ◆ Item key and title
- ◆ Instructor
- ◆ Item completion status and/or completion grade: Indicates whether or not an item was successfully completed.
- ◆ Completion date/time



Note: Enter the actual completion date of the item. This is extremely important in times when the course requires the learner to complete it on an on-going interval as retraining due dates are based upon last completion.

- ◆ Hour types: Total, credit, contact, and CPE hours
- ◆ Comments

Figure 24 indicates the SATERN mandatory fields when recording a learning event:

- ◆ **Instructor- required if MTM is being used** – otherwise highly recommended or Center mandatory
- ◆ **Total Hours** – Pre-populated from segments
- ◆ **Credit Hours** – Pre-populated from Design Data tab



Learning Event Recorder [| Help |](#)

> Step 1> Step 2> Step 3

Step 3: Enter Learning Event Information

[Previous](#) [Next](#)

* = Required Fields

Item: OJT KSC-NEO-AWO-CC (Rev 12/18/2009 03:37 PM America/Indianapolis)
Title: NEW EMPLOYEE ORIENTATION TO ASSIGNED WORK-CC

Instructor:

Default Grade:

* Default Completion Status: OJT_COMP (Completed) - For Credit

* Completion Date: (MM/DD/YYYY)

* Completion Time: (hh:mm AM/PM)

* Time Zone: America/Indianapolis (Eastern Standard Time)

Default Price (\$): (1000)

Currency ID: US Dollar (USD)

Total Hours: (1000)

Credit Hours: (1000)

Contact Hours: (1000)

CPE: (1000)

Figure 24. Learning Event Recorder

ACCESSING THE LEARNING EVENT RECORDER

To access the Learning Event Recorder, navigate to **Learner Management > Tools > Learning Event Recorder** (Figure 25).

Learning Event Recorder [| Help |](#)

> Step 1

Step 1: Select Event Type

[Next](#)

☒ Item ☐ External Event ☐ Scheduled Offering

Figure 25. Learning Event Recorder



When recording a learning event through Quick Links, Record Learning Tool, the Custom Fields, Per Diem, Travel, Book_Material_Cost, and Per_Participant_Cost are not available to complete. These fields only show up if you use the Learning Event Recorder (Learner Management>Tools>Learning Event recorder).

NASA Business Rule

The Record Learning Event feature through Quick Links shall never be used to record a learning event. All recorded learning events shall use the Learning Event Recorder (Learner Management > Tools > Learning Event recorder).



Lab 16. Recording a Learning Event for an Item

Step

1. Navigate to **Learner Management > Tools > Learning Event Recorder**.
2. Click the **Item** radio button.
3. Click **Next**.
4. Click the **item search icon**.
5. Enter search criteria to search for the item.
6. Click **Search**.
7. Click the **Select** link next to the item to select.
8. Click **Next**.
9. Select an instructor, default completion status, and completion date and time.
10. Click **Next**.
11. Click the **add one or more from list** link.
12. Enter search criteria to search for learners who have participated in the learning event.
13. Click **Search**.
14. Click the **Add** checkboxes next to the learners for which to record the learning event.
15. Click the **Add** button.
16. Click **Next**.

17. Enter any comments for the learner(s). Note: These comments will be displayed in the learning history.
18. Change the status and grade, if necessary for individual learners.
19. Click **Next**.
20. Enter learning event financial information if identified.
21. Review the information.
22. Click **Finish**.



Note: The **Start Over** button allows the admin to repeat the process of recording another learning event for the same set of learners.

Learning History

After a learning event is recorded, the learner's Learning History in SATERN displays the learning events that have just been completed. From the learner record's Learning History tab, the admin is able to view the history of all SATERN entered events (Figure 26).

Learners

Search | Add New | Help |

> Search > Search Results > Edit Learning History

User Name: cwinters

Name: WINTERS, CHASE S

Summary

Learning Plan

Learning History

Competencies

More Options

View the Learning History for the Learner

Sort By:

Completion Date

Item Title	Status	Completion Date	Details
CONFERENCE EX-HI-PET (Rev 11/13/2007 08:58 AM America/Indianapolis)	Completed	3/1/2010 05:00 PM America/Indianapolis	View Details
PARTNERS IN ENVIRONMENTAL TECHNOLOGY			
CONFERENCE EX-HMG-WATS (Rev 4/9/2008 10:46 AM America/Indianapolis)	Completed	2/26/2010 04:30 PM America/Indianapolis	View Details
WORLD AVIATION TRAINING SYMPOSIUM			
BOOK BK1327_SPL (Rev 4/30/2008 09:30 AM America/Indianapolis)	Completed	2/5/2010 11:30 AM America/Indianapolis	View Details
NASA SYSTEMS ENGINEERING HANDBOOK			
BOOK APOLLO (Rev 7/20/2007 02:52 PM America/Indianapolis)	Completed	1/4/2010 12:00 PM America/Indianapolis	View Details
APOLLO			

Figure 26. Learner Record: Learning History Tab

Items with Retraining

Select items within a curriculum that must be repeated on a recurring interval will have a retraining assignment. Once the item is complete and recorded (in the learner's Learning History), it is flagged as complete and the next *required by* date it is due according to the date calculated by the retraining assignment. In this situation, the admin will see the item in the Learning Plan with the new date for completion and in the Learning History with the date completed.

Certificate of Completion



Admins or learners can print certificates upon successful completion of an item. Certificates are generated in .pdf format and will open in Adobe Acrobat Reader. Certificates are not generated within SATERN for external events.

LEARNING EVENT EDITOR

Learning events may be edited with the Learning Event Editor found under the Learner Management menu. Admins need to be given permissions to edit or delete learning event records.



LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- ◆ Learning History
- ◆ Item Status
- ◆ Curriculum Item Status

CONCLUSION

In Lesson 6, you were introduced to recording learning events. Learning events can be recorded against items (including scheduled offerings) and external event. Regardless of which is recorded, a Learning History record is created for the learner.

You should now be able to:

- Identify the two types of learning events that can be recorded
- Record a learning event
- View the learning event in the Learning History



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

Only *For Credit* completions are displayed in a Learning History.

2. For which of the following may a learning event be recorded?

- a) Item
- b) External event
- c) Schedule block
- d) Scheduled offering

3. True or false:

Learners can edit their Learning History record.



Notes



Course Summary

Through lecture, activities, and hands-on computer lab work, this course taught you the concepts and terminology associated to SATERN's Learning Needs Management Model. You developed a working knowledge of this model for use in implementation of your learning needs management strategy. You also gained basic, hands-on experience using the system functions in order to create and modify items and curricula, assign learning through manual and automated methods, and record learning events.

You should now be able to:

- Identify items in SATERN
- Add and modify items using step-by-step instructions contained in this classroom guide
- Identify curricula in SATERN
- Add and modify curricula using step-by-step instructions contained in this classroom guide
- Configure period-based curriculum assignments
- Assign learning to learners using step-by-step instructions contained in this classroom guide
- Propagate automated learning assignments to learners
- Record a learning event for an item



Final Activity

1. Identify an actual curriculum in your organization that requires at least two items to be completed by a group of learners. Identify the types of items and the kind of information you need to include on the various tabs.

2. Decide whether or not any of the items should be retaken after a given number of days.

3. Be sure to perform, at a minimum, the functions below:
 - a. Add two new items.
 - b. Add a curriculum and associate the items created in Step a.
 - c. Assign the curriculum to a group of learners.
 - d. Record a learning event for a group of learners against one of the items from Step a.
 - e. View a learner's Learning History for which you recorded the learning event and verify the item is listed.

Learning Extras

This section provides some extra learning-related topics, including:

- ◆ Substitutes and prerequisites
- ◆ Item Revision Assistant
- ◆ Requirements-based curricula
- ◆ Required Dates Editor
- ◆ Learner management tools
- ◆ Merging the models

SUBSTITUTES AND PREREQUISITES

In some training situations, it is necessary to grant a learner substitute credit for item A after completing item B (this is especially useful in curricula). Also, it may be necessary to prevent a learner from registering into an advanced item until after the successful completion of the prerequisite basic item.

Topic Objectives

Upon completion of this topic, you will be able to:

- Establish substitute relationships
- Establish prerequisite relationships

Substitute Items

Upon successful completion of a substitute item, SATERN grants credit for another item by recording two learning events.

For example, the *MICROSOFT OFFICE 2000 - BEGINNING EXCEL* item is listed on Chase's Learning Plan. *MICROSOFT OFFICE 2000 - ADVANCED EXCEL* is a substitute for *MICROSOFT OFFICE 2000 - BEGINNING EXCEL*. Chase completes and passes *MICROSOFT OFFICE 2000 - ADVANCED EXCEL*. After an admin records the advanced course as a learning event for Chase, SATERN records an additional learning event for the basic course. Therefore, Chase's Learning History displays the learning events depicted in Figure 27.

Item Title	Status	Completion Date	Details
COURSE DFRC-111080_ENG (Rev 4/26/2006 11:00 PM America/Indianapolis)	Substitute	3/24/2010 05:00 PM America/Indianapolis	View Details
MICROSOFT OFFICE 2000 - BEGINNING EXCEL			
COURSE DFRC-SS-111238-ENG (Rev 12/19/2006 01:38 PM America/Indianapolis)	Completed	3/24/2010 05:00 PM America/Indianapolis	View Details
MICROSOFT OFFICE 2000 - ADVANCED EXCEL			

Figure 27. Learning History of a Substitute Item

This is particularly useful in a curriculum. For example, the *MICROSOFT OFFICE CURRICULUM* requires the completion of *MICROSOFT OFFICE 2000 - BEGINNING EXCEL*. The learner assigned this curriculum must have *MICROSOFT OFFICE 2000 - BEGINNING EXCEL* on his/her Learning History to fulfill the requirement. Substitutes record a learning event of the required item in the learner's Learning History in order to satisfy the curriculum requirement.

Force Credit



If **Force Credit** is not checked when setting up the curriculum, then learners must have the item receiving substitute credit in their Learning Plans in order for SATERN to record the substitute learning event. When **Force Credit** is checked, learners always



receive substitute credit for the item regardless whether it is assigned to their Learning Plans.

Effective Date

If an effective date is set when a substitute relationship is created, all learners that have the grant item, with a completion date on or after the effective date, will be given retroactive credit for the item receiving the credit.



Lab 17. Establish a Substitute Relationship Using the Previous Example

Step

1. Search for the *MICROSOFT OFFICE 2000 - BEGINNING EXCEL* item.
2. Click the **Edit** icon to access the item record in edit mode.
3. Select the **Substitutes** tab.
4. Click **add one or more from list**.
5. Enter search criteria to find the *MICROSOFT OFFICE 2000 - ADVANCED EXCEL* item.
6. Click **Search**.
7. Select the substitute completion status from the drop-down menu.



Note: *This is the completion status for the item the learner will receive substitute credit for.*

8. Check the **Force Credit** checkbox.
9. Enter an effective date (when you would like to apply retroactive substitute credit to learners).
10. Check the **Add** checkbox.
11. Click the **Add** button.
12. Verify the selected item is displayed with the correct settings.
13. Record a learning event for the item that grants credit.
14. Check the learner's Learning History.



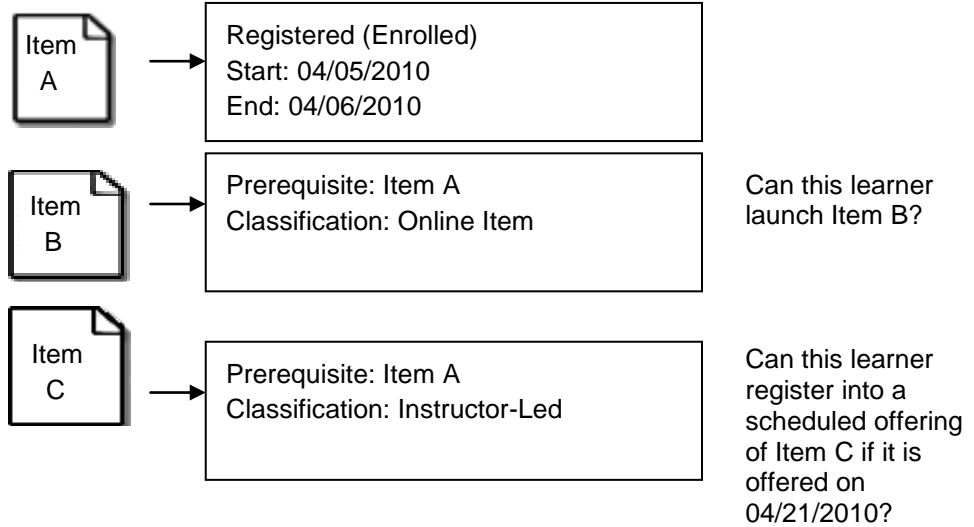
Prerequisites

Prerequisites are identified in the item's Prerequisite tab. This tab is used to establish which items must be completed before a learner can self-register or launch the current item. A learner will be unable to self-register into a scheduled offering of this item until the prerequisite is either entered in his/her Learning History or he/she is registered into a scheduled offering of the prerequisite that has an end date prior to the start date of this item. In the case of an online item, the prerequisite must be in the learner's Learning History before he/she is able to launch this item.



Activity

Answer the questions using the information provided.





Lab 18. Establish a Prerequisite Relationship

Step

1. Navigate to **Learning > Items**.
2. Search for and edit the item that has a prerequisite.
3. Select the **Prerequisites** tab.
4. Click **add one or more from list**.
5. Enter search criteria to search for the prerequisite item.
6. Click **Search**.
7. Check the **Add** checkbox.
8. Click the **Add** button.
9. Verify the selected item is displayed.



Topic Related Reports

The following are reports in SATERN that relate to this topic:

- ◆ Item with Item Prerequisites
- ◆ Substitute Relationships

Topic Conclusion

In this topic, you learned about substitutes and prerequisites. Using these features in SATERN allows learners to take differing items to satisfy their curriculum requirements, or prevents learners from registering into items they are not prepared to take. In any case, these features are not required, but provide additional flexibility in your training solution.

You should now be able to:

- Establish substitute relationships
- Establish prerequisite relationships



Topic Check

Use what you learned in this topic to answer the following questions.

1. How many learning events are recorded on completion of a substitute item when **Force Credit** is used?

2. True or false:

It is possible to set up an **or** relationship of items on the Prerequisites tab of the item record.

3. Why would you check the **Force Credit** checkbox on the Substitute tab of the item record?

4. Explain a situation where you need to create a substitute relationship.



Activity

Consider the following situation:

- ◆ Item A grants credit for Item B.
- ◆ Item B grants credit for Item C.
- ◆ Force Credit is **not** checked.
- ◆ Effective date is **not** set.

Answer the following question:

1. If the learner is assigned all three items to his/her Learning Plan and completes Item A, the learner:
 - a) Only receives credit for items A and B.
 - b) Receives credit for items A, B, and C.
 - c) Only receives credit for Item A, since **Force Credit** is not checked.

ITEM REVISION ASSISTANT

There are times when content for an item changes so dramatically it is required for employees to re-complete the new revised item. The Revision Assistant allows the administrator to create a new version of the item. The item type and ID of the new item remain the same as the original item. The revision date/time stamp (and revision number) is the only part of the item key that changes. The old version of the item can and should be inactivated, but it is not deleted from SATERN. If there is a need to access the old version of the item in the future for audit purposes, it is available to the administrator that can access inactive records.

The Revision Assistant enables the admin to create a new version of the item for all learners who:

- ◆ Are required to complete the item as a part of a curriculum
- ◆ Have the item as a free-floating assignment

Topic Objectives

Upon completion of this topic, you will be able to:

- Revise an item using the Revision Assistant
- Explain the function of the Curriculum Clean Up automatic process
- Describe the affects of item revision on curriculum and free floating item assignments

Revising Items

As mentioned in Lesson 1, the item key is comprised of item type, item ID, and revision date/time. During item revision, SATERN creates a new item record. The item type and ID of the new item are identical to the original. The revision date/time is the updated portion



of the item key. An admin is also prompted to update the version number. After the revision process is complete, the admin should inactivate the old item. It is not deleted from SATERN in case there is a need to access the old item for audit and reporting purposes.

Making revisions to items have effects to the following:

- ◆ Substitutes
- ◆ Instructor authorization
- ◆ Curriculum assignment of the original item
- ◆ Effective date
- ◆ Free floating assignment of the original item
- ◆ Future scheduled offerings of the original item
- ◆ Inactivate
- ◆ Prerequisites

Substitutes

If the admin checks the appropriate checkbox in Step 2 of the Revision Assistant, SATERN copies the substitute items listed under Substitute tab of the original item to the Substitute tab of the revised item.

Instructor Authorization

If the admin checks the appropriate checkbox in Step 2 of the Revision Assistant, authorized instructors of the original item are authorized to teach the revised item.

Curriculum Assignment of the Original Item

If the admin checks the appropriate checkboxes in Step 4 of the Revision Assistant, SATERN lists the revised item on the learner's Learning Plan (even if there is a successful learning event recorded



for the original item). If the original item is on the Learning Plan, both items displays until SATERN runs the Curriculum Cleanup automatic process.

Effective Date

The effective date identifies the date when an item will cause a curriculum status to change to incomplete if the item is not completed (in the Learning History). This is equivalent to a “grace period.” This is used only within curricula. The effective date is placed in the future to allow time for everyone who has an old version of an item completed a chance to complete the revised (new version) item so his/her curriculum status does not revert to *Incomplete*.

Free Floating Assignment of the Original Item

If the admin checks the appropriate checkboxes in Step 4 of the Revision Assistant, SATERN lists the revised item on the learner’s Learning Plan. Both items displays until SATERN runs the Curriculum Cleanup automatic process.

Future Scheduled Offerings of the Original Item

If the admin checks the appropriate checkbox in Step 4 of the Revision Assistant, SATERN updates existing scheduled offerings that have start dates in the future with the revised item.

Inactivate

If the admin checks the appropriate checkbox in Step 4 of the Revision Assistant, SATERN deactivates the original item.

Prerequisites

Prerequisites of the original item are automatically transferred to the revised item.



Lab 19. Revise an Item

Step

1. Navigate to **Learning > Items**.
2. Search for and access an item in edit mode.
3. Click the **Revise...** button.
4. Enter a new revision date and revision time.
5. *Optional:* Enter a revision number.
6. Change the item title, if necessary.
7. Click **Next**.
8. Check the substitute relationship and authorized instructors checkboxes.
9. Click **Next**.
10. Click **Make this item production ready**.
11. Click **Next**.
12. Check all four checkboxes in Step 4 of the item revision process.
13. Click **Next**.
14. If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc.



Note: If the item has an assignment type of Required (or similar), you must enter an effective date.

15. Click **Next** to review the displayed information.
16. Click **Run Job Now**.

Curriculum Clean Up

Once an item is revised, there are two item records in the system. Both may be listed on the Learning Plan of the assigned learners (depending upon the choices made during the revision process).

The Curriculum Clean-Up APM (Automatic Process Module) checks every Learning Plan and compares item records. If it finds two items with the same ID and type, it removes the item with the earlier revision date/time. Curriculum Clean-Up typically runs nightly, but speak with your SATERN coordinator to find the frequency.

Topic Conclusion

In this topic, we discussed revising items. Based upon admin specifications, the revision process can affect curriculum and/or free floating item assignments. The Revision Assistant can also maintain substitute relationships, authorized instructors, and update future scheduled offerings. Finally, the Curriculum Clean-Up automatic process removes the double item assignment from Learning Plans of the learners.

You should now be able to:

- Revise an item using the Revision Assistant
- Explain the function of the Curriculum Clean Up automatic process
- Describe the affects of item revision on curriculum and free floating item assignments



Topic Check

Use what you learned in this topic to answer the following questions.

1. True or false:

The admin can choose to **not** transfer prerequisites from the original item to the revised item.

2. Explain a situation when you do **not** want to preserve substitute relationships.

3. Why is it important to run Curriculum Clean-Up?

4. Explain a situation when you would set the effective date in the future.



5. What part of the item key is updated during the item revision?

6. True or false:

An admin can update all future scheduled offerings of the original item to the revised item.

REQUIREMENTS-BASED CURRICULA

Not all training situations are solved with a simple list of required items. There are other requirements that a learner must accomplish to complete his/her assigned curriculum (e.g., hours, external training, etc.). Requirements-based curricula provide this needed flexibility.

Topic Objectives

Upon completion of this topic, you will be able to:

- Define a requirement and item pooling
- Describe requirements-based curricula
- List the three requirement types
- Describe the functionality of a requirement group
- Create requirements and requirement groups

Requirement-Based Curricula

Requirements-based assignments provide flexibility in creating and assigning multiple requirements that are used in evaluating curriculum status. External learning events can also count towards curriculum status.

What is a Requirement?

Requirements define a set of conditions that the learner must meet to receive a *Complete* curriculum status. The conditions are related to the number of hours or items that the learner must successfully complete. Learners are required to meet the defined conditions of the Requirements tab and Items tab to *complete* the curriculum.

A requirement object functions like an item. Both are assignable, use period-based assignments, and impact the curriculum status.



Requirement Types

There are three requirement types:

- ◆ # hours of specified hour type
- ◆ # hours of specified hour type from pool of items
- ◆ # items from pool of items

Hours of Specified Hour Type

This type requires hours of one of the following hour types:

- ◆ Total hours
- ◆ Credit hours
- ◆ Contact hours
- ◆ CPE hours

SATERN grants requirement hour credit for any item, scheduled offering, or external learning event.

Hours of Specified Hour Type from Pool of Items

This type requires hours of one of the following hour types:

- ◆ Total hours
- ◆ Credit hours
- ◆ Contact hours
- ◆ CPE hours

SATERN only grants requirement hour credit for items included in the pool.

Items from Pool of Items

This type requires the learner to complete a specified number of items included in the pool.



Lab 20. Create a Requirement

Step

1. Navigate to **Learning > Requirements**.
2. Click **Add New**.
3. Select a requirement type from the **Requirement Type** drop-down menu.
4. Enter a requirement ID and a requirement description.
5. Select a domain ID.
6. Enter the requirement creation date.
7. Enter any comments, as desired.
8. Leave the **Active** checkbox checked.
9. Click **Next**.
10. Select the hour type from the **Hour Type** drop-down menu.
11. Enter the required hours in the textbox.
12. Click **add one or more from list** to search for items to add to the requirement.
13. Enter search criteria to search for items to add.
14. Click **Search**.
15. Check **Add** next to items to add.
16. Click the **Add** button.
17. Verify the selected items are listed in the *Item Pool for Requirement* section.
18. Click the **Add** button.



Requirement Group

The requirement group is located under the Requirements tab of the curriculum record. This gives the learner a requirements option.

For example, the following requirement group contains the following requirements:

- ◆ 50 contact hours
- ◆ 75 total hours

This group requires the learner to earn 50 contact hours **or** 75 total hours to complete the requirement.



Lab 21. Assign Requirements to a Curriculum

Step

1. Navigate to **Learning > Curricula**.
2. Enter search criteria to search for the curriculum to which to add requirements.
3. Click **Search**.
4. Click the **Edit** icon.
5. Select the **Requirements** tab.
6. Click **add one or more from list** to search for requirements to add.
7. Enter search criteria.
8. Click **Search**.
9. Check **Add** next to each requirement to add.
10. Click the **Add** button.
11. *Optional:* Click the **Edit** link to enter initial and retraining information for each requirement and effective date, if desired.
12. *Optional:* To group requirements:
 - a. If more than one requirement is selected, check **Select** next to the requirements to group.
 - b. Click **Group**.
 - c. Enter group description, initial, retraining assignment information, and an effective date as appropriate.
 - d. Click **Create Group**.

Topic Conclusion

In this topic, we discussed requirements-based curriculum. Using requirements an admin specifies the number of hours of a specific hour type, the number of hours of a specific hour type from an item pool, or a number of items for an item pool. In addition, the admin creates requirement groups to give the learner a choice of requirements. Using requirements provide greater flexibility than simple required items.

You should now be able to:

- Define a requirement and item pooling
- Describe requirements-based curricula
- List the three requirement types
- Describe the functionality of a requirement group
- Create requirements and requirement groups



Topic Check

Use what you learned in this topic to answer the following questions.

1. List the three requirement types.

2. Explain item pooling.

3. True or false:

External learning events count towards *# Hours of specified Hour Type*.

4. How do you create an **or** situation with one or more requirements?



REQUIRED DATES ASSISTANT

This topic introduces you to the Required Dates Assistant tool in SATERN.

Topic Objectives

Upon completion of this topic, you will be able to:

- Update the item required date using the Required Dates Assistant
- Identify situations to use the Required Dates Assistant
- Describe the effect of the Learning Event Synchronization process on manual required dates

Required Dates Assistant

Admins can change required dates directly on the learner's Learning Plan. This is not practical if you need to update a large number of learning records. The Required Dates Assistant is a tool used to change the required date of one or more items assigned to one or more learners. This is used when:

- ◆ A scheduled offering is not available until a later date.
- ◆ The scheduled offering has been cancelled due to lack of resources (classrooms, instructors, etc.)

The Required Dates Assistant updates required dates of free floating and curriculum item assignments (Figure 28).

Required Dates Assistant

[Help](#)

[> Step 1](#) > [Step 2](#) > [Step 3](#) > **Step 4**

Step 4: Edit Item Required Date

Previous

Finish

Curriculum	Item	Title	Required Date (MM/DD/YYYY)
ARC-HR-EPCS	COURSE HQ-001-07 (Rev 4/17/2007 11:00 AM America/Indianapolis)	EMPLOYEE PERFORMANCE COMMUNICATION SYSTEM (EPCS)	<div> <div></div> <div>06/30/2010</div> </div>
	COURSE HQ-001-07 (Rev 4/17/2007 11:00 AM America/Indianapolis)	EMPLOYEE PERFORMANCE COMMUNICATION SYSTEM (EPCS)	<div> <div></div> <div>06/30/2010</div> </div>

Figure 28. Required Dates Editor

The Required Dates Assistant requires the admin to update the required date using the same method as assignment.

For example, if you assigned the Item A via the Item A curriculum, then you must update the required date by specifying the Item A curriculum in the Required Dates Assistant.

Likewise, if you assigned an Advanced Project Management item directly to a learner's Learning Plan, then you must specify the item in the Required Dates Assistant.



Lab 22. Use the Required Dates Assistant

Step

1. Navigate to **Learning > Tools > Required Dates Assistant**.
2. Click **add one or more from list** to add learners.
3. Enter search criteria to search for learners.
4. Click **Search**.
5. Check the **Add** checkboxes next to each learner who needs a required date change.
6. Click the **Add** button.
7. Click **Next**.
8. Click **add one or more from list** to search for curricula to add.
9. Enter search criteria.
10. Click **Search**.
11. Check **Add** next to each curriculum to add.
12. Click the **Add** button.
13. Click **Next**.
14. Click **add one or more from list** to search for free-floating items to add.
15. Enter search criteria.
16. Click **Search**.
17. Check **Add** next to each free-floating item to add.



18. Click the **Add** button.
19. Click **Next**.
20. Enter a new required date for each item listed.
21. Click **Finish**.
22. Note the message listing the number of learner records that were updated with the new required date(s).

Learning Event Synchronization

This process verifies the learning events of learners. It also recalculates required dates. Therefore, this process overrides all manually updated required dates. Including those updated with Required Dates Assistant, and resets them to calculated dates based on the item assignment.

Topic Conclusion

In this topic we discussed the Required Dates Assistant. This tool is useful when scheduled offerings are cancelled or unavailable and you need to provide additional time for learners to complete their item assignments. The Required Dates Assistant requires the admin to update the required date the same way the item was assigned (e.g., curriculum or free floating). Finally, if the Learning Event Synchronization process runs, it overrides the manually set required dates and resets them based on the item assignment.

You should now be able to:

- Update the item required date using the Required Dates Assistant
- Identify situations to use the Required Dates Assistant
- Describe the effect of the Learning Event Synchronization process on manual required dates



Topic Check

Use what you learned in this topic to answer the following questions.

1. Describe a situation when you would use the Required Dates Assistant.

2. Where is the Required Dates Assistant located in SATERN?

- a) Tools > Required Dates Editor
- b) Learner > Tools > Required Dates Assistant
- c) Learning > Tools > Required Dates Assistant

3. True or false:

If an admin assigned an item via a curriculum, but selects the item in step 3 of the Required Date Assistant in order to change the required date, SATERN updates the required date of the item.



LEARNER MANAGEMENT TOOLS

In many situations, we need to contact learners to inform them of a change, correction, or update. The tools in Learner Management address all these situations.

Topic Objectives

Upon completion of this topic, you will be able to:

- Send a notification to a learner population based on item or curriculum criteria
- List the additional filtering options of the email notification

Notification Assistant

The Send Notifications wizard identifies a group of learners and then sends a message to them as an ad-hoc notification. An ad-hoc notification broadcasts email through SATERN like a standard notification, but you control the time that it is sent and the group of learners to which it is sent instead of the system automatically grouping and sending the notification.

***Item Assignment***

Using the Email Notification Assistant, an admin sends email to learners based on:

- ◆ Free floating item assignments
- ◆ Item assignment type
- ◆ Completion status

Curriculum Assignment

Using the Email Notification Assistant, an admin sends email to learners based on:

- ◆ Curriculum assignments
- ◆ Completion status



Lab 23. Send Item/Curriculum Assignment Notification

Step

1. Navigate to **Learner Management > Tools > Send Notifications**.
2. Click the **Item** (or **Curriculum**) radio button.
3. Click **Next**.
4. Click **add one or more from list** to add items/curricula.
5. Enter search criteria.
6. Click **Search**.
7. Check the **Add** checkbox next to each item/curriculum.
8. Click the **Add** button.
9. Click **Next**.
10. Refine your search by selecting a requirement type and/or completion status (or curriculum status for curriculum).
11. Click **Next**.
12. Verify the list of selected learners. If necessary, add additional learners.
13. Click **Next**.
14. Search for:
 - a. Email Template (optional)
 - b. Reply To address (optional)
 - c. From address (required)
 - d. CC addresses (optional)



15. Add an attachment (optional).
16. Enter a subject for the notification (required).
17. Enter the body for the notification (required).
18. Click **Send Notification**.



Topic Conclusion

In this topic, we discussed the additional tools available. If you need to send an email based on an assignment, the Learner Management tools step you through the process.

You should now be able to:

- Send a notification to a learner population based on item or curriculum criteria
- List the additional filtering options of the email notification



Topic Check

Use what you learned in this topic to answer the following questions.

1. True or false:

Email notifications arrive to the learners the instant the admin presses the **Send** button.

2. Besides the specific items and curriculum, name the additional filtering options in the Send Notifications tool.
